

Form 470

A competitive bidding process is a formal process to identify and request the products and services you need so that potential service providers can review those requests and submit bids for them. To open the process, applicants must post a Form 470 to the USAC website within the E-rate Productivity Center (EPC) Portal.

The entity that will run the competitive bidding process - which may be you, a state procurement agency, or another entity that you have authorized to negotiate on your behalf with a Letter of Agency (LOA) - certifies an FCC Form 470 (Description of Services Requested and Certification) in the E-rate Productivity Center (EPC) and must be prepared to receive and evaluate bids and negotiate with service providers. Vendor bids are not submitted to USAC or through a central portal.

Filing the Form 470

The Form 470 for the upcoming funding year is generally available on the USAC website by July 1 of the preceding year. For example, for FY 2024 (which begins July 1, 2024), the Form 470 became available on the USAC website for filing on or July 1, 2022. Applicants that are seeking month-to-month services must use the Form 470 for the upcoming funding year and may not file prior to July 1. However, for applicants that have large procurements and intend to sign contracts for those services, Form 470s may be filed at any time.

After the Form 470 is certified, USAC will issue a Form 470 Receipt Notification Letter (RNL) in the entity's EPC News feed. Applicants can edit some fields in a certified FCC Form 470. Allowable changes include:

- Editing an application name
- Changing the main contact person and/or technical contact person
- Making minor, non-substantive updates to an RFP

Applicants must wait at least 28 days from the date the FCC Form 470 is certified before closing the competitive bidding process. Changes to the FCC Form 470 beyond the allowable changes require applicants to re-post a new Form 470, or in the case of an RFP being issued with a Form 470, to extend the bidding period by 28 days from making the changes and posting an addendum in the Form 470 portal.

If a consultant is assisting you with the application process, you must go to your organization profile in EPC, add your consultant in the Manage Your Organization Relationships area of your EPC account, and identify your consultant on your Form 470.

Requests for Proposal (*Please refer to Tab 7 of this Manual for more detailed information*)

The entity filing a Form 470 can issue a Request for Proposal (RFP) in addition to the Form 470. In general, an RFP is a formal bidding document that describes the project and requested services in sufficient detail so that potential bidders understand the scope, location, and any other requirements. However, USAC uses "RFP" or "RFP document" generically to refer to any bidding document that

describes your project and requested services in more detail than in the fields provided on the Form 470.

E-rate Program rules do not require applicants to issue an RFP. Generally, you are not required to issue an RFP unless your state or local procurement rules or regulations require you to do so. However, if you have issued or will issue an RFP, you must upload that document in EPC. Do not upload a document that simply contains a link to the RFP.

There are additional competitive bidding requirements for leased dark fiber and for self-provisioned networks. The eligible service options are represented on the FCC Form 470 by various drop-down options. The FCC Form 470 Category One Services Drop-Down Menu Reference Table provides additional guidance about how to select the correct drop-down option and when an RFP is required.

Please note that an RFP is required in EPC if you are requesting the options for:

- "Leased Dark Fiber and Leased Lit Fiber"
- "Self-Provisioned Network and Services Provided Over Third Party Networks"
- "Network Equipment"
- "Maintenance & Operations"
- "Cellular Data Plan/Air Card Service"
- "Other"

If you issue RFP documents after your Form 470 is certified, you are required to upload them to your form using the Add an RFP Document feature in the Related Actions menu on your form in EPC.

Exemption from Filing a Form 470

Commercially available business class Internet access services are exempt from the FCC Form 470 posting requirement if they cost \$3,600 or less annually per entity (school or library), including any one-time costs such as installation; provide bandwidth speeds of at least 100 Mbps downstream and 10 Mbps upstream; and provide basic conduit access to the Internet at those required minimum speeds. This exemption applies even if the service is purchased on a non-contract month-to-month basis.

This exemption is intended to assist the smallest applicants with making the E-rate application process easier. These requirements are per building and cannot be averaged over several buildings.

Category 1 Form 470 Filing Guide



October 2022

Purpose of Form 470

- Online form to notify vendors of services and equipment for which you are seeking proposals
 - All equipment/services for which you will seek funding on the Form 471 must be posted on a Form 470
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
 - Day 1 = date of Form 470 submission
 - Day 29 = earliest date that you can conduct your bid evaluation and select your vendor
- Vendors send proposals directly to the applicant
- You are NOT obliged to purchase any service/equipment listed on Form 470

When Must a Form 470 be Used?

- Form 470s must be posted for all MTM/non-contract services and at the beginning of any new contract
 - If you signed a multi-year contract in a previous year, after posting a Form 470 and waiting 28 days, you are NOT required to post a 470 for the “out” years of that contract
 - Not required if using the [CABIO](#) internet bidding exemption
- Don't have to file 470 if using a contract extension, but only if that extension was specifically outlined in the original contract
 - For example: 3-year term, with two, 1-year extensions
 - Must have a definitive end to contract
 - Automatic renewals of contracts do not qualify and must be rebid on a new Form 470

Additional 470 Requirements

- Cannot list company name (such as Comcast or Zito)
 - If bidding C1 network equipment (rare), cannot list manufacturer-specific name without including the words “or equivalent”
- RFPs
 - Encouraged, but not required, except for:
 - All applicants applying for leased dark fiber, self-provisioned fiber, or wireless data plans
 - All RFPs must be uploaded with Form 470 at time of filing
 - Addenda also must be uploaded to online 470 when released
 - If adding sites, changing services or providing additional information not previously in RFP, must wait an additional 28 days before closing bidding
- Vendors cannot provide RFP language or bid lists

Deadline to File Form 470s

- A Form 470 must be posted online at least 29 days before the Form 471 window close (example: March 23 close = Feb. 22 deadline)
 - 471 Deadline is expected to be mid-March, 2023
 - File 470 before December 1, if possible
- Recommended timeline:
 - November: File all Form 470s by December 1
 - December: Vendor bids submitted during December
 - January: Bid evaluation, board agenda submission
 - February: School board approval, sign contracts
 - March: File Form 471

Form 470s being accepted in EPC NOW!

How Many Form 470s to File

- Category 1 and Category 2 can be filed on the same 470
 - But not a requirement
 - However, C1 and C2 requests must be on different 471s
- There is no 1:1 requirement for 470 vs 471s
- If filing multiple 470s, be sure to use good Nicknames for easy identification when completing the Contract Record

Where to File the Form 470

- Form must be filed in EPC – the E-rate Productivity Center
- Before filing the Form 470, be sure to check the Entity List on the Landing Page to be sure all of your buildings (schools, libraries, NIFs) are listed
 - **Contact USAC to have missing buildings added to EPC**
 - Cannot add entities yourself

LET'S FILE A FORM 470!



470 – File Inside Your EPC Portal

News Tasks (5) Records Reports Actions

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)!

Funding Request Report **FCC Form 470** FCC Form 471 FCC Form 486
Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution
Manage Users | Manage Organizations | USAC Website | Contact Us | Help

Give it a Nickname

Basic Information Service Requests Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature

> FCC Notice Required By The Paperwork Reduction Act (OMB Control Number: 3060-0806)

▼ Billed Entity Information

THE BEST SCHOOL DISTRICT - (PARENT ENTITY) Billed Entity Number: 108
100 Main Street FCC Registration Number: 0123456789
Apt 2
Springfield, PA 19064
555-555-5555
school.district4.user1@mailinator.com

Application Nickname

Please enter an application nickname here. *

DISCARD FORM SAVE & SHARE SAVE & CONTINUE

Use a well-described nickname for easier identification.

Basic Information – Can't Change in Form

THE BEST SCHOOL DISTRICT - (PARENT ENTITY) - Category 1 Form 470 - Form #220000189

Last Saved: 11/10/2021 2:22 PM EST

Basic Information

Service Requests

Technical Contact Information

Notice the numbering convention for the 470's. Form 470 begins with the Funding Year.

Where applicable, we've completed this section of the form based on information from your applicant entity's profile. If any of the non-editable information is incorrect, or you wish to change the information, please update your profile first by going to your entity record, and clicking Manage Organization from the Related Actions menu. If you do not have access to Manage Organization, please contact your applicant entity's account administrator or create a customer service case to request updates to your applicant entity's profile.

Application Type and Recipients of Service

Applicant Type: School District

Number of Eligible Entities: 12

Recipient(s) of Service Public School Pre-K Head Start

of Eligible Entities is pre-populated from the EPC Profile. It is the total # of entities in the district, not necessarily the # of entities seeking service on this 470.

Recipients of Service

Billed Entity Name	Billed Entity Number
THE BEST SCHOOL DISTRICT - (PARENT ENTITY)	108

BACK DISCARD FORM

SAVE & SHARE SAVE & CONTINUE

Who is the Main Contact?

Contact Information

Are you the main contact person? *

YES NO

If you select 'No' then you must select another User in your EPC profile. The system will not let you type in someone's contact information. To add a User, have the EPC Account Administrator go to > Related Actions > Add User

BACK DISCARD FORM

SAVE & SHARE SAVE & CONTINUE

Select Category(ies) of Service

Basic Information **Service Requests** Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature

Next, you will identify the category(s) of service requested.

Visit [our website](#) for more information on how to file the FCC Form 470.

Category(s) of Service

What are the category(s) of service that you are requesting? *

CATEGORY 1

- Data Transmission and/or Internet Access

CATEGORY 2

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

You can include both C1 and C2 requests on the same Form 470, but it's not required.

Do You Have an RFP?

Basic Information **Service Requests** Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature


If you are using RFPs for any of the requested services, start by uploading them all first.


RFPs for Service Requests

Is there a RFP for any of the services you are requesting?

YES ✓ NO

Please upload all RFPs for the services you are requesting. ⓘ

 **RFP Doc Sample**
DOCX – 11.35 KB

 Drop file here

You must upload your actual RFP document. Uploading a document with a hyperlink to another website, including bid management sites, is not sufficient and can lead to funding denial.

If you have an RFP or any documents you will be providing to vendors, you **must** upload them with the Form 470. The system will allow you to upload multiple documents and then you can decide which requests belong with which RFP documents.

More on RFP Requirements

- All applicants seeking the following services MUST issue an RFP:
 - Leased Dark Fiber
 - Self-Provisioned Fiber
 - C1 Network Equipment
 - Maintenance and Operation of Leased Dark or Self-Provisioned Fiber
 - Wireless Data Plans (rarely eligible except for bookmobiles)
- All RFPs and related documents must be uploaded with the 470
 - Cannot just provide a link
- All subsequent material provided to vendors must be uploaded to the RFP/470 in EPC
 - Locate 470 in EPC > Related Actions > Add an RFP Document
 - 28-day clock must be restarted if material changes are made to the RFP
 - USAC considers MOST changes to be significant enough require an extension of the 28-day clock or a new Form 470

Creating Category 1 Service Requests



Begin Building the Category 1 470

Next, you will describe the services you are requesting.

Service Requests: Category One

There are currently no Category One service requests. Please enter the service requests below by selecting 'Add New Service Request'.

ADD NEW SERVICE REQUEST EDIT SERVICE REQUEST REMOVE SERVICE REQUEST

Narrative
If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

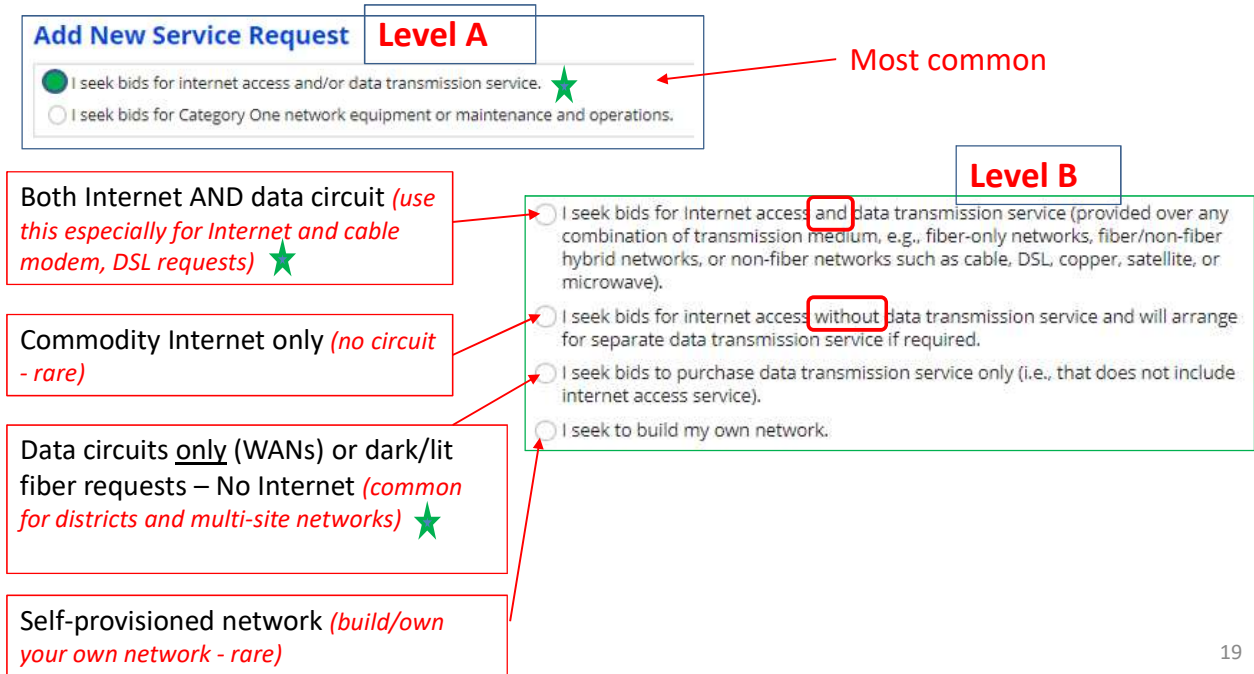
Choose "Add New Service Request" to select the proper service description.

BACK DISCARD FORM SAVE & SHARE **SAVE & CONTINUE**

Category 1 Form 470 for FY 2022

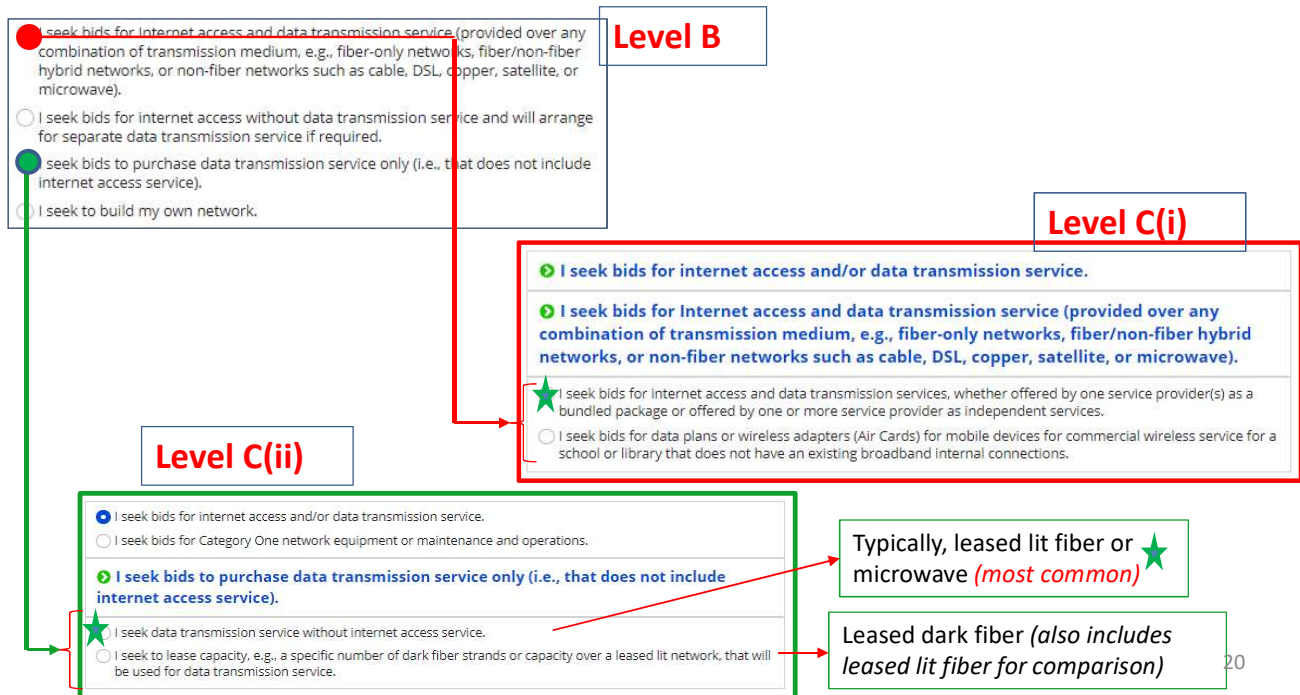
- Beginning in FY 2022, the FCC revamped the Form 470 to be description-based
- Using 'progressive disclosure' method, the form will show you additional choices
- Using the following "Category 1 Cheat Sheets" to select the option that best reflects the service you're seeking
 - A green star indicates the most common choice ★
 - Level A is the first page that everyone sees, and the subsequent levels change depending on what option is selected on the previous level

Category 1 Form 470 for FY 2022



Category 1 Form 470 for FY 2022

- 1st or 3rd Options have additional level:



Internet: Bundled

- Bundled Internet is the most common Internet type and can include Internet delivered via cable, fiber, microwave, satellite, etc.

Add New Service Request

I seek bids for internet access and/or data transmission service.

I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

I seek bids for internet access and data transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service provider as independent services.

Service Type
Data Transmission and/or Internet Access

Function *
Internet Access and Data Transmission Service

Quantity *
of Circuits (usually (1) for bundled internet)

Unit
Each

Minimum Capacity
Please select a value

Maximum Capacity
Please select a value

Number of entities served? *
of School/Library Buildings Being Served

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

Provide data that best matches the service you are seeking and then more fully describe those services in the narrative box.

Internet: Standalone - No Transport

- Standalone Internet is a rare selection where the underlying circuit is purchased separately (mostly used by consortium)

Add New Service Request

I seek bids for internet access and/or data transmission service.

I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

Service Type
Data Transmission and/or Internet Access

Function *
Standalone Internet Access Service

This is not a commonly selected service option. It does not include data transmission service, which is needed to deliver Internet access to the school or library building.

Minimum Capacity
of Circuits

Maximum Capacity
Please select a value

Number of entities served? *
of School/Library Buildings Being Served

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

Transport Circuit Only (WAN)

- Most common for leased lit fiber or microwave circuits
- Use when no Internet is being sought

Add New Service Request

I seek bids for internet access and/or data transmission service.

I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

I seek data transmission service without internet access service.

Service Type
Data Transmission and/or Internet Access

Function *
Standalone Data Transmission Service

This service option does not include Internet access service; if this option is selected, the applicant will have to procure Internet access service separately.

Quantity *
of circuits

Unit
Each

Minimum Capacity
Please select a value

Maximum Capacity
Please select a value

Number of entities served? *
of school/libraries being served

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

Leased Dark Fiber

- Must also bid “leased lit fiber” – and compare
- Cannot specify preference for which fiber you prefer

I seek bids for internet access and/or data transmission service.

I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

I seek to lease capacity, e.g., a specific number of dark fiber strands or capacity over a leased lit network, that will be used for data transmission service.

Service Type
Data Transmission and/or Internet Access

Function *
Leased Dark Fiber and Leased Lit Fiber

This service option does not include the modulating equipment needed to light the dark fiber; applicants are responsible for obtaining this modulating equipment separately.

Leased Dark Fiber	Leased Lit Fiber
Quantity *	Quantity *
Unit Fiber Strands	Unit Each
Minimum Capacity Detailed in RFP	Minimum Capacity * Please select a value
Maximum Capacity Detailed in RFP	Maximum Capacity Please select a value

Additional Details

Number of entities served? *

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

Add New Service Request

I seek bids for Category One network equipment or maintenance and operations.

I own or lease my own network or network capacity and seek bids for the electronics to make the network functional.

I own or lease my own network and seek bids for maintenance and operations of the connections.

Also may want to post separate request for Category 1 Network Equipment



Self-Provisioned Fiber (you own it)

- Must also bid “services provides over 3rd party networks” – meaning all other transport technologies – and compare
- Cannot specify which service you prefer

I seek bids for internet access and/or data transmission service.

I seek to build my own network.

Service Type
Data Transmission and/or Internet Access

Function *
Self-Provisioned Network (Applicant Owned and Operated Network) and Services Provided Over Third-Party Networks

Self-Provisioned Network (Applicant Owned and Operated Network)	Services Provided Over Third-Party Networks
Quantity * <input type="text"/>	Quantity * <input type="text"/>
Unit Each	Unit Each
Minimum Capacity Detailed in RFP	Minimum Capacity * <i>Please select a value</i>
Maximum Capacity Detailed in RFP	Maximum Capacity * <i>Please select a value</i>

Additional Details

Number of entities served? *

Are you also seeking Installation, Activation and Initial Configuration?
 Yes
 No

Add New Service Request

I seek bids for Category One network equipment or maintenance and operations.

I own or lease my own network or network capacity and seek bids for the electronics to make the network functional.

I own or lease my own network and seek bids for maintenance and operations of the connections.

Also post separate request for Category 1 Network Equipment

Narrative in Text Box for C1 Requests

- Use the narrative text box to describe your services more fully and instructions for bidders

Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

Seeking proposals for 2, 3 and 4 GB of symmetrical Internet delivered via fiber.
DQ reasons:
Deadline for vendor questions:
Deadline for vendor proposals:
Proposals must be submitted to XXX via e-mail.

Special Construction Charges: Want to Spread Them Out? - YES

Installment Payment Plan

Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? *

- Yes
 No

Over how many years do you wish to amortize the costs? *

4

4

Please select a range of years above.

Do you prefer annual or monthly payments? *

- Annual
 Monthly

- If you selected any “fiber” services that require Special Construction (build-out) charges, you can request to pay the vendor for the non-discounted amount (the school or library’s share) over 4 years
- Vendors aren’t required to agree
- This is a great idea to make fiber build-out more affordable
- E-rate portion will still be paid in the 1st year
 - Will not be amortized

Want to Add Technical Contact?

Technical Contact Person

Is there a person who can provide additional technical details or answer specific questions from service providers about the services you are seeking?

YES ✓

NO

How would you like to enter the technical contact details? *

SEARCH EPC SYSTEM

ENTER DETAILS MANUALLY

- You may add a technical contact that vendors can contact to ask additional questions about the procurement
 - Not a requirement to add a separate technical contact
- If you do, you may select a current EPC User
- Or you can manually enter the name/contact information of the contact

State or Local Procurement Rules?

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

YES ✓ NO

If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

- Always select YES!
- Then use the narrative box to provide additional requirements/instructions to vendors
- For example:
 - All bids must be submitted to X person by X date in X format
 - Vendor must provide discounted bills
 - Vendor must submit 3 references of district officials where identical services were provided within last 2 years
 - Vendors must attend pre-bid meeting on X date

Generate PDF to Review

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

YES ✓ NO

If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

For example:
-- All bids must be submitted to X person by X date in X format
-- Vendor must provide discounted bills
-- Vendor must submit 3 references of district officials where identical services were provided within last 2 years
-- Vendors must attend pre-bid meeting on X date
-- ETC

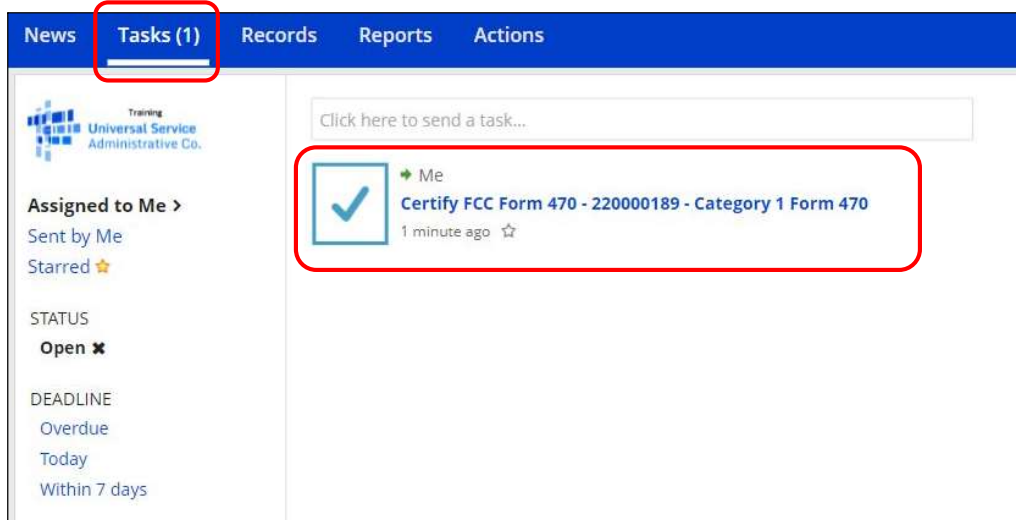
BACK DISCARD FORM

SAVE & SHARE REVIEW FCC FORM 470

Click "Review FCC Form 470" to have the system generate a PDF copy of your draft Form 470 to review

Generate PDF to Review

In about 15 seconds, the draft Form 470 PDF will be available as a “Task” in the top blue toolbar of your EPC Portal. Click on Tasks, then click on “Certify FCC Form 470 to review the draft or to certify the form. (The system will also send you an e-mail giving you a direct link to the draft page.)



Review PDF and Make Changes

THE BEST SCHOOL DISTRICT - (PARENT ENTITY) - Category 1 Form 470 - Form #220000189
Last Saved: 11/11/2021 11:19 AM EST

Basic Information Service Requests Technical Contact Information Procurement Information **FCC Form 470 Review** Certifications & Signature

Please download and carefully review this FCC Form 470 before certifying.

Download Document Link
[USAC_FCC_FORM_470_APPLICATION_220000189_DRAFT](#) ← Click here to download the PDF

By checking this box, I certify that the information in the PDF document above is correct.

Click the 'Back' button to return to the form and make corrections

If the form is accurate, check the box, and click “Continue to Certification” if you are a Full Rights User, or “Send for Certification” if you are a Partial Rights User.

Required Certifications

Applicant Certifications

- I certify that the applicant includes schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801 (18) and (38), that do not operate as for-profit businesses, and do not have endowments exceeding \$50 million.

Other Certifications

- I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders for at least 28 days before considering all bids received and selecting a service provider. I certify that all bids submitted will be carefully considered and the bid selected will be for the most cost-effective service or equipment offering, with price being the primary factor, and will be the most cost-effective means of meeting educational needs and technology goals.
- I certify that I will retain required documents for a period of at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification) after the later of the last day of the applicable funding year or the service delivery deadline for the associated funding request. I certify that I will retain all documents necessary to demonstrate compliance with the statute and Commission rules regarding the form for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that I may be audited pursuant to participation in the schools and libraries program.
- I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding requirements and that I have complied with them. I acknowledge that persons willfully making false statements on this form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. § 1001.
- I acknowledge that FCC rules provide that persons who have been convicted of criminal violations or held civilly liable for certain acts arising from their participation in the schools and libraries support mechanism are subject to suspension and debarment from the program.
- I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be used primarily for educational purposes; see 47 C.F.R. § 54.500, and will not be sold, resold or transferred in consideration for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 54.513. Additionally, I certify that the entity or entities listed on this form have not received anything of value or a promise of anything of value, other than services and equipment sought by means of this form, from the service provider, or any representative or agent thereof or any consultant in connection with this request for services.
- I acknowledge that support under this support mechanism is conditional upon the school(s) and/or library(ies) I represent securing access, separately or through this program, to all of the resources, including computers, training, software, internal connections, maintenance, and electrical capacity necessary to use the services purchased effectively. I recognize that some of the aforementioned resources are not eligible for support. I certify that I have considered what financial resources should be available to cover these costs. I certify that I am authorized to procure eligible services for the eligible entity(ies). I certify that I am authorized to submit this request on behalf of the eligible entity(ies) listed on this form, that I have examined this request, and to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

You must check all of the certification boxes before you can finish the certification and officially submit the form.

Required Certifications

Public reporting burden for this collection of information is estimated to average 3.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, completing, and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the reporting burden to the Federal Communications Commission, Performance Evaluation and Records Management, Washington, DC 20554. We also will accept your comments via the email if you send them to PRA@FCC.gov. DO NOT SEND COMPLETED WORKSHEETS TO THESE ADDRESSES.

BACK

CERTIFY

After all of the Certification boxes are checked, click the live Certify button!

Then click "yes" in the final pop-up box:

False statements on this form may result in civil liability and/or criminal prosecution. To electronically sign and certify this form, click "Yes" below. To affirm that you (1) understand the statements above and (2) represent the entity featured, and have the authority to make the certifications, on this form, click "Yes" below.

NO YES

Where to Find a Copy of Your 470

- On EPC Landing Page, scroll to the bottom
- Select Form 470
- Select appropriate Funding Year
- Select specific Form 470

Click here to get to your Landing Page!



▼ FCC Forms and Post-Commitment Requests

FCC Forms Status All
 Post-Commitment Requests Incomplete
 Certified

Form Type: ←

Funding Year: ←

Nickname	Application Number	Funding Year	Status
Category 1 Form 470	220000189	2022	Certified

Where to Find a Copy of Your 470

- The next screen will be a Summary Page of the submitted Form 470, with a link to the RFP Documents
 - RFP documents must be downloaded separately
- To obtain PDF of submitted Form 470, select 'Generated Documents'

Summary **Generated Documents** News Related Actions

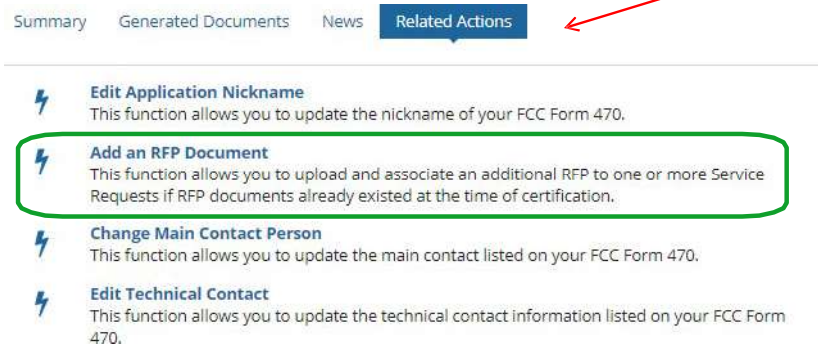
- Then select 'Original Version'

Generated FCC Forms 470

FCC Form 470 Version	Upload Date
Original Version	11/11/20 1:57 PM

To Make Changes to Submitted 470

- Note: very few changes can be made to a Form 470 after it's submitted
- Additional changes can be made to an RFP document, but only if an RFP was uploaded with the original Form 470
 - "RFP document" refers to any bidding document that describes your project and requested services in more detail than in the fields provided on the Form 470
- To make changes, or upload an additional RFP document, click 'Related Actions'



Caution When Modifying RFP

- Applicants must wait at least 28 days from the date the Form 470 is certified before closing the competitive bidding process
- Warning!

Changes to the Form 470 beyond the allowable changes require applicants to wait an additional 28 days from the date of the change before closing the competitive bidding process.

The EPC system will not automatically recalculate the new Allowable Contract Date; applicants must do this manually.

Category 2 Form 470 Filing Guide



October 2023

Categories of Service Recap

- **Category 1** – Services that go TO the school

- Subcategories:
 - Data Transmission Services (fiber, coaxial cable, etc.)
 - Internet Access
- Maximum discount is 90%
- No E-rate funding caps



- **Category 2** – Services/equipment that go INSIDE the school

- Subcategories:
 - **Internal Connections**
 - Basic Maintenance of Internal Connections
 - Managed Internal Broadband Services (MIBS)
- Maximum discount is 85%
- Subject to 5-year E-rate funding caps



Internal Connections

- Wireless Access Points/Controllers
- Network Routers & Switches
- In-Building Structured Cabling
- Caching Servers
 - Only eligible servers
- Firewalls (appliances only)
 - No ancillary modules/functions are eligible, like anti-spam, anti-virus, etc.
 - No 'redundant' or high availability firewalls
- Racks and UPSs
 - That support eligible equipment only
 - Network cards aren't eligible
- Equipment licenses
 - Multi-year licenses can be requested in first year
- Cloud-based functionality of this equipment



- **Not eligible:**
 - Storage Devices
 - Voice/Video Components
 - End User Devices

Internal Connections Purchase Timeline

- Applicants have full 18 months to purchase/install equipment
- Equipment can be purchased as early as April 1, prior to funding year start
 - For example, applicants can purchase equipment on April 1, 2024 for FY 2024, even though funding year doesn't begin until July 1, 2024
 - Vendors/applicants cannot be reimbursed from USAC until July 1
 - Applicants that purchase equipment prior to receiving funding commitment letter are risking paying full price
- Equipment can be purchased as late as September 30, following the end of funding year
- Allows applicants two full summers to install equipment

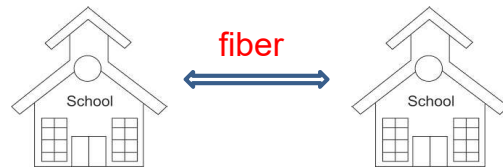
		FUNDING YEAR 2024 APPLICATION CYCLE																													
		FY 2024 - Non-Recurring Services/Equipment Purchases - April 1, 2024 - Sept 30, 2025												FY 2024 - Recurring Services - July 1, 2024 - June 30, 2025																	
Form	Description	Sept 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	June 2024	July 2024	Aug 2024	Sept 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	June 2025	July 2025	Aug 2025	Sept 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	
470	Competitive Bidding Window (min. 29 days)	July 1, 2023 - February 27, 2024 <i>estimated</i>																													
AW	Administrative Window (EPC Profile Updates)	Oct. 28, 2023 - Jan. 15, 2024 <i>estimated</i>																													
	Newly Signed Vendor Contracts Uploaded to EPC																														
471	Funding Request Application Window							Jan. 17, 2022 - Mar. 27, 2024 <i>estimated</i>																							
PIA/FCDL	PIA Review/Funding Decision Letters (FCDL) Issued									April 2024 - Sept 1, 2024																					
486	CIPA Certification/Turn on Funding																														
472	BEAR Deadline - Recurring Services																														
	BEAR Deadline - Non-Recurring Services																														

School-to-School Fiber Eligibility

- For schools that are in close proximity, applicants often want to use C2 funds to install fiber between them
- FCC has well-intentioned, but restrictive rules related to these connections, as follows:

- **1 school but located in 2 buildings (rare)**
 - Fiber between those buildings = Category 2
 - Does PDE recognize it as single school?
- **2 schools but located in same building (rare)**
 - Fiber between those schools = Category 2
- **2 schools but located in different buildings (common)**
 - Fiber between these buildings = Category 1
 - Would list as “Self Provisioned Fiber” on Form 470
 - Cannot use C2 funding, unfortunately

FCC is further reviewing this policy, and considering C2 treatment of these connections, but changes will likely not be effective until after FY 2024.



5

Basic Maintenance (BMIC)

- **Eligible:**
 - Repair and upkeep of eligible hardware
 - Wire and cable maintenance
 - Configuration changes
 - Basic technical support including online and telephone-based technical support
 - Software upgrades and patches including bug fixes and security patches
- **Eligibility limitations:**
 - Contract must specifically identify the equipment being covered, including product name, model number and location.
 - Support will only be paid for actual work performed under contract.
 - Support for bug fixes, security patches, and technical support is 100% eligible
- **BMIC does not include:**
 - Services that maintain ineligible equipment
 - Upfront estimates that cover the full cost of every piece of eligible equipment
 - Services that enhance the utility of equipment beyond the transport of information or diagnostic services more than those necessary to maintain the equipment’s ability to transport information
 - Network management services, including 24-hour network monitoring
 - On-site technical support (i.e., contractor duty station at the applicant site)
 - Unbundled warranties

Basic Maintenance (BMIC) Recommendation

I do not recommend that applicants use their C2 budgets for BMIC. Why?

1. Can only be for services/work performed from during 12-month funding year (7/1/2024 – 6/30/2025)
 - Does **not** follow the 4/1/2024 – 9/30/2025 schedule
 - Does **not** follow the first 12 months of ownership schedule
2. Multi-year contracts must be amortized
 - Cannot apply for full cost of multi-year BMIC contract in Year 1
 - Must amortize and request discounts for each year, annually
3. Next day replacement contracts not eligible
 - Only basic tech support, configuration changes are 100% eligible
4. Conditionally eligible = repair of equipment, cable maintenance
 - E-rate will commit based on amount of contract
 - BUT.... will only reimburse for time/parts used
 - C2 budget takes “hit” based on full commitment, not funds “used”

~ Use your Category 2 budgets for equipment and installation ~

7

Managed Internal Broadband Services (MIBS)

- Definition:
 - Services provided by a 3rd party for the operation, management and monitoring of eligible internal connections (managed wi-fi)
- Eligible:
 - Management and operation of the LAN/WLAN, including installation, activation, and initial configuration of eligible components and on-site training on the use of eligible equipment
- Eligibility limitations:
 - Only eligible equipment may be managed
 - Must have listed specific equipment to be maintained in RFP
- Has traditionally not been popular among applicants
- 2 Options:
 - Paying an outside vendor to own/maintain the equipment
 - Paying an outside vendor to maintain school-owned equipment
- Subject to the C2 budget caps

Equipment Transfer/Disposal Rules

- **Transfers:** As of July 1, 2021, E-rate funded equipment from any year may be transferred between eligible buildings
 - If equipment is transferred between buildings within 5 years from date of purchase, must record reason and date of transfer and update asset inventory
 - No notice to USAC is required
 - Asset inventory must be retained for 10 years from date of purchase
- **Disposal:** Equipment may be disposed of, sold, transferred, etc. from 5 years from the date of installation
 - No notice to USAC required but asset inventory must be updated

NIFs Not Eligible for C2 Funding

- Non-instructional facilities (NIFs) continue to be ineligible for C2 funding **except for** shared equipment located in and used by the NIF in which the equipment is located
 - Must deduct proportional share of **any other NIF** use of any shared equipment
- Equipment may be housed at a NIF, and used by the NIF; however, site specific equipment may not be purchased and installed in the NIF.
 - For example, a Wireless Controller may be housed at data center
 - Wireless Access Points in NIFs may not be purchased with E-rate



After 5 years, transfer equipment to NIF

Hints When Constructing Form 470

- Always list bid due date/time
 - “Bids are due on X date/time to Y person. We reserve the right to reject late-submitted proposals.”
- List all possible disqualification factors (Y/N format)
- List interoperability and compatibility requirements
 - “Must be interoperable with the school’s existing XYZ equipment”
- Consider pre-bid walkthrough for cabling projects
- It’s ok to forward your posted 470 to potential vendors to encourage bidding
- Although RFPs aren’t required, even a 1-page document describing your project and disqualification criteria is a good idea
 - That way the system permits future amendments/documents to be uploaded with the existing 470

11

470 – File Inside Your EPC Portal



The screenshot shows the 'My Applicant Landing Page' in the EPC Portal. The top navigation bar includes 'News', 'Tasks (5)', 'Records', 'Reports', and 'Actions'. A user profile icon and the name 'Appian' are visible in the top right. The main content area features the 'Universal Service Administrative Co.' logo and the text 'Training'. A list of navigation links is displayed on the right, with 'FCC Form 470' highlighted by a red box and a red arrow pointing to it. Other links include 'Funding Request Report', 'FCC Form 471', 'FCC Form 486', 'Appeal', 'IDD Extension', 'FCC Form 500', 'SPIN Change', 'Service Substitution', 'Manage Users', 'Manage Organizations', 'USAC Website', 'Contact Us', and 'Help'. A welcome message at the bottom reads 'Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)!'

12

Give it a Nickname

Basic Information Service Requests Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature

> **FCC Notice Required By The Paperwork Reduction Act (OMB Control Number: 3060-0806)**

▼ **Billed Entity Information**

THE BEST SCHOOL DISTRICT - (PARENT ENTITY) Billed Entity Number: 108
100 Main Street FCC Registration Number: 0123456789
Apt 2
Springfield, PA 19064
555-555-5555
school.district4.user1@mailinator.com

Application Nickname

Please enter an application nickname here. *

Category 2 Form 470

DISCARD FORM SAVE & SHARE SAVE & CONTINUE

Use a well-described nickname for easier identification in EPC.

13

Basic Information – Can't Change in Form

▼ **Application Type and Recipients of Service**

Applicant Type: School District

Number of Eligible Entities: 12

Recipient(s) of Service

- Public School
- Pre-K
- Head Start
- Adult Education
- Public School District

Recipients of Service

Billed Entity Name	Billed Entity Number
THE BEST SCHOOL DISTRICT - (PARENT ENTITY)	108

BACK DISCARD FORM SAVE & SHARE SAVE & CONTINUE

of Eligible Entities is pre-populated from the EPC Profile. It is the total # of entities in the district, not necessarily the # of entities seeking service on this 470.

14

Who is the Main Contact?

Contact Information

Are you the main contact person? *

If you select 'No' then you must select another User in your EPC profile. The system will not let you type in someone's contact information. To add a User, have the EPC Account Administrator go to > Related Actions > Add User

15

Select Category(ies) of Service

Basic Information

Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Next, you will identify the category(s) of service requested.

Visit [our website](#) for more information on how to file the FCC Form 470.

Category(s) of Service

What are the category(s) of service that you are requesting? *

- Data Transmission and/or Internet Access
- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services

You can include both C1 and C2 requests on the same Form 470, but it's not required.

16

Do You Have an RFP?

Basic Information **Service Requests** Technical Contact Information Procurement Information FCC Form 470 Review Certifications & Signature


If you are using RFPs for any of the requested services, start by uploading them all first.


RFPs for Service Requests

Is there a RFP for any of the services you are requesting?

YES ✓ NO

Please upload all RFPs for the services you are requesting. ⓘ

 **RFP Doc Sample**
DOCX - 11.35 KB

 Drop file here

You must upload your actual RFP document. Uploading a document with a hyperlink to another website, including bid management sites, is not sufficient and can lead to funding denial.

If you have an RFP or any documents you will be providing to vendors, you **must** upload them with the Form 470. The system will allow you to upload multiple documents and then you can decide which requests belong with which RFP documents.

17

Building Category 2 Service Requests



18

Category 2 Form 470 Changes

- Beginning in FY 2022, the FCC revamped the Form 470 to be description-based
- Basic maintenance is now a check-off box on an internal connections request, but can also be a stand-alone request
- Using the following “Category 2 Cheat Sheet” to select the option that best reflects the service you’re seeking
 - A green star indicates the most common choice ★

19

Begin Building the Category 2 470

Service Requests: Category Two

There are currently no Category Two service requests. Please enter the service requests below by selecting 'Add New Service Request'

[ADD NEW SERVICE REQUEST](#) [EDIT SERVICE REQUEST](#) [REMOVE SERVICE REQUEST](#)

Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

Choose “Add New Service Request” to select detailed choices.

[BACK](#) [DISCARD FORM](#) [SAVE & SHARE](#) [SAVE & CONTINUE](#)

20

Category 2 Form 470 for FY 2024

Use for equipment/license requests (*most common*) ★

Use if bidding maintenance ONLY (*uncommon*)

Use if bidding managed internal broadband services (MIBS) (*uncommon*)

If you want vendors to include pricing for support with their quotes, check this box

Add New Service Request

- I seek bids for the equipment needed for broadband connectivity within schools and libraries and/or the related software and right-to-use licenses necessary for the equipment to function. ★
- I seek bids for basic maintenance service on eligible equipment and/or support services (e.g., bug fixes, software upgrades, and security patches) appropriate to maintain reliable operation.
- I seek bids for the operation, management, and monitoring of eligible broadband internal connections.

Service Type
Internal Connections

Function *
Routers and Necessary Software and Licenses

Quantity *

Unit
Each

Please select this option if you would like to create an accompanying Category Two BMIC request for this IC request.

Manufacturer
No Preference

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

21

Internal Connections Drop Down Menu Options

Add New Service Request

★ I seek bids for the equipment needed for broadband connectivity within schools and libraries and/or the related software and right-to-use licenses necessary for the equipment to function.

Service Type

Internal Connections

Function *

Please select a value

- Antennas, Connectors, and Related Components
- Cabling
- Caching and Necessary Software and Licenses
- Firewall Service, Components, and Necessary Software and Licenses
- Racks
- Routers and Necessary Software and Licenses
- Switches and Necessary Software and Licenses
- Uninterruptible Power Supply/Battery Backup and Necessary Software and Licenses
- Wireless Access Points and Necessary Software and Licenses
- Wireless Controllers and Necessary Software and Licenses

Select the equipment type you're seeking. If more than one, create a separate service request

22

Service Request Details

Add New Service Request

I seek bids for the equipment needed for broadband connectivity within schools and related software and right-to-use licenses necessary for the equipment to function.

Service Type
Internal Connections

Function*
Switches and Necessary Software and Licenses

Quantity*

Unit
Each

Please select this option if you would like to create an accompanying Category Two BMIC request for this IC request.

Manufacturer
No Preference

Are you also seeking Installation, Activation and Initial Configuration for this service? *
 Yes
 No

Please select the RFP(s) that apply to this service request.
 RFP Doc Sample

Choose your preferred manufacturer. If not listed, select 'Other' then type in the manufacturer's name and include the words "or equivalent"

New for FY 2022: If you want maintenance/support for this equipment, check this box. No separate BMIC service request is needed

Provide additional details about your service/equipment requests in the narrative.

Narrative in Text Box for C2 Requests

- Use the narrative text box to describe the equipment you're seeking, or direct bidders to the attached RFP

Narrative

If you would like to provide further detail about the services or equipment sought, you may do so in this box below. Examples include:

- Any disqualification factors;
- Additional details about the eligible locations that will be receiving these services; or
- Other information about the services requested that would help bidders develop bids that are responsive to your needs.

Seeking bids on 2 Ubiquiti XXX Model Switches, or equivalent.
Must be compatible with District's existing YYY equipment/protocols.
Bid requirements and disqualification reasons are contained in the RFP.
Proposals due by XXXX date to the Form 470 contact. All questions must be submitted via e-mail.

Want to Add Technical Contact?

Technical Contact Person

Is there a person who can provide additional technical details or answer specific questions from service providers about the services you are seeking?

YES ✓

NO

How would you like to enter the technical contact details? *

SEARCH EPC SYSTEM

ENTER DETAILS MANUALLY

- You may add a technical contact that vendors can contact to ask additional questions about the procurement
 - Not a requirement to add a separate technical contact
- If you do, you may select a current EPC User OR you can manually enter the name/contact information of the contact

25

State or Local Procurement Rules?

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

YES ✓

NO

If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

- Always select YES!
- Then use the narrative box to provide additional requirements/instructions to vendors or direct bidders to your RFP
- For example:
 - All bids must be submitted to X person by X date in X format
 - Vendor must provide discounted bills
 - Vendor must submit 3 references of district officials where identical services were provided within last 2 years
 - Vendors must attend pre-bid meeting on X date

26

Generate PDF to Review

State or Local Procurement Requirements

Are there state or local procurement/competitive bidding requirements that apply to the procurement of services sought?

YES ✓ NO

If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

For example:
-- All bids must be submitted to X person by X date in X format
-- Vendor must provide discounted bills
-- Vendor must submit 3 references of district officials where identical services were provided within last 2 years
-- Vendors must attend pre-bid meeting on X date
-- ETC

BACK DISCARD FORM SAVE & SHARE REVIEW FCC FORM 470

Click "Review FCC Form 470" to have the system generate a PDF copy of your draft Form 470 to review

27

Generate PDF to Review

In about 15 seconds, the draft Form 470 PDF will be available as a "Task" in the top blue toolbar of your EPC Portal. Click on Tasks, then click on "Certify FCC Form 470 to review the draft or to certify the form.

(The system will also send you an e-mail giving you a direct link to the draft page.)

The screenshot shows the EPC Portal interface. At the top is a blue navigation bar with the following tabs: News, Tasks (1), Records, Reports, and Actions. The 'Tasks (1)' tab is highlighted with a red box. Below the navigation bar, on the left, is the logo for 'Training Universal Service Administrative Co.' and the text 'Assigned to Me >' and 'Sent by Me'. On the right, there is a search bar with the placeholder text 'Click here to send a task...'. Below the search bar is a task list. The first task is highlighted with a red box and contains a blue checkmark icon, the text 'Me', and the title 'Certify FCC Form 470 - 220000191 - Category 2 Form 470'. Below the title is the text 'A moment ago' and a star icon.

28

Review PDF and Make Changes

Basic Information Service Requests Technical Contact Information Procurement Information **FCC Form 470 Review** Certifications & Signature

Please download and carefully review this FCC Form 470 before certifying.

Download Document Link

[USAC_FCC_FORM_470_APPLICATION_220000191_DRAFT](#) ← Click here to download the PDF

By checking this box, I certify that the information in the PDF document above is correct.

Click the 'Back' button to return to the form and make corrections

If the form is accurate, check the box, and click "Continue to Certification" if you are a Full Rights User, or "Send for Certification" if you are a Partial Rights User.

29

Required Certifications

Applicant Certifications

- I certify that the applicant includes schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801 (18) and (38), that do not operate as for-profit businesses, and do not have endowments exceeding \$50 million.

Other Certifications

- I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders for at least 28 days before considering all bids received and selecting a service provider. I certify that all bids submitted will be carefully considered and the bid selected will be for the most cost-effective service or equipment offering, with price being the primary factor, and will be the most cost-effective means of meeting educational needs and technology goals.
- I certify that I will retain required documents for a period of at least 10 years (or whatever retention period is required by the rules in effect at the time of this certification) after the later of the last day of the applicable funding year or the service delivery deadline for the associated funding request. I certify that I will retain all documents necessary to demonstrate compliance with the statute and Commission rules regarding the form for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that I may be audited pursuant to participation in the schools and libraries program.
- I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding requirements and that I have complied with them. I acknowledge that persons willfully making false statements on this form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b), or fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. § 1001.
- I acknowledge that FCC rules provide that persons who have been convicted of criminal violations or held civilly liable for certain acts arising from their participation in the schools and libraries support mechanism are subject to suspension and debarment from the program.
- I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be used primarily for educational purposes, see 47 C.F.R. § 54.500, and will not be sold, resold or transferred in consideration for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 54.513. Additionally, I certify that the entity or entities listed on this form have not received anything of value or a promise of anything of value, other than services and equipment sought by means of this form, from the service provider, or any representative or agent thereof or any consultant in connection with this request for services.
- I acknowledge that support under this support mechanism is conditional upon the school(s) and/or library(ies) I represent securing access, separately or through this program, to all of the resources, including computers, training, software, internal connections, maintenance, and electrical capacity necessary to use the services purchased effectively. I recognize that some of the aforementioned resources are not eligible for support. I certify that I have considered what financial resources should be available to cover these costs. I certify that I am authorized to procure eligible services for the eligible entity(ies). I certify that I am authorized to submit this request on behalf of the eligible entity(ies) listed on this form, that I have examined this request, and to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

You must check all of the certification boxes before you can finish the certification and officially submit the form.

30

Required Certifications

Public reporting burden for this collection of information is estimated to average 3.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, completing, and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the reporting burden to the Federal Communications Commission, Performance Evaluation and Records Management, Washington, DC 20554. We also will accept your comments via the email if you send them to PRA@FCC.gov. DO NOT SEND COMPLETED WORKSHEETS TO THESE ADDRESSES.

BACK CERTIFY

After all of the Certification boxes are checked, click the live Certify button!

Then click "yes" in the final pop-up box:

False statements on this form may result in civil liability and/or criminal prosecution. To electronically sign and certify this form, click "Yes" below. To affirm that you (1) understand the statements above and (2) represent the entity featured, and have the authority to make the certifications, on this form, click "Yes" below.

NO YES

31

Where to Find a Copy of Your 470

- On EPC Landing Page, scroll to the bottom
- Select Form 470
- Select appropriate Funding Year

Click here to get to your Landing Page!



▼ FCC Forms and Post-Commitment Requests

FCC Forms

Post-Commitment Requests

Status All

Incomplete

Certified

Form Type FCC Form 470

Funding Year 2022

Nickname	Application Number	Funding Year	Status
Category 1 Form 470	220000189	2022	Certified
Category 2 Form 470	220000191	2022	Certified

Where to Find a Copy of Your 470

- The next screen will be a Summary Page of the submitted Form 470, with a link to the RFP Documents
 - RFP documents must be downloaded separately
- To obtain PDF of submitted Form 470, select 'Generated Documents'
- Click on 'Original Version'



FCC Form 470 Version	Upload Date
Original Version	11/15/21 12:30 PM

To Make Changes to Submitted 470

- Note: very few changes can be made to a Form 470 after it's submitted
- Additional changes can be made to an RFP document, but only if an RFP was uploaded with the original Form 470
 - "RFP document" refers to any bidding document that describes your project and requested services in more detail than in the fields provided on the Form 470
- To make changes, or upload an additional RFP document, click 'Related Actions'



Summary	Generated Documents	News	Related Actions
 Edit Application Nickname This function allows you to update the nickname of your FCC Form 470.			
 Add an RFP Document This function allows you to upload and associate an additional RFP to one or more Service Requests if RFP documents already existed at the time of certification.			
 Change Main Contact Person This function allows you to update the main contact listed on your FCC Form 470.			
 Edit Technical Contact This function allows you to update the technical contact information listed on your FCC Form 470.			

Caution When Modifying RFP

- Applicants must wait at least 28 days from the date the Form 470 is certified before closing the competitive bidding process
- Warning!

Changes to the Form 470 beyond the allowable changes require applicants to wait an additional 28 days from the date of the change before closing the competitive bidding process.

The EPC system will not automatically recalculate the new Allowable Contract Date; applicants must do this manually.

Next Steps – All C2 Procurements

- Vendors will submit proposals directly back to the contact indicated on the 470/RFP
- After bid due date, ensure bids are compliant with minimum qualifications and conduct bid evaluation
 - Be sure that price of eligible equipment and services is the most heavily weighted factor
- Contact winning vendor to seek contract
- Seek board approval (if required)
- Sign contract
 - All C2 requests must have signed contracts
 - Contract can be as simple as a vendor quote that is signed by the school or library. Be sure to include:
 - Contract signing date (must be before 471 filing date)
 - Contract term: 4/1/2023 through 9/30/2023
 - Purchase is contingent upon E-rate funding and local funding approval
- Create Contract Record in EPC and upload contract
- Submit Form 471

C2 Purchasing Reminders

- ✓ Create and Maintain Asset Inventory
 - All audits require this to be submitted
 - Sample available in Tab 15 of Resource Binder & available for emailing to you
- ✓ Only purchase exact equipment that was approved on 471
 - If equipment is different, seek a **Service Substitution** from USAC
- ✓ Keep everything
 - E-rate rules now require you to keep all documents related to procurement, purchasing, discount calculations, invoicing for 10 years from the last date to receive service or service delivery deadline, whichever is later



37

General Category 2 Bidding Timeline

- Post 470 before December 1
- Bids due 29 days after 470 is posted
- **Consider adding 2 weeks to bidding schedule to allow vendor questions**
- Evaluate bids early January
- Seek board approval during January or February meeting (if required)
- Sign contracts immediately following board meeting
- Create Contract Record in EPC
- Complete 471 by March 1, if possible. No later than March 10



38

FY2022-FY2023 FCC Form 470 Services Guiding Statements Table

Starting with Funding Year 2022, the FCC Form 470 includes guiding statements to help applicants request E-Rate eligible services and/or equipment for the upcoming funding year. The following tables provide a quick way to reference the options provided in the form along with guiding messages.

Please see footnotes for additional information where provided.

Category One

If you intend to request bids for:	You should first select “I seek bids for internet access and/or data transmission service.” Next, choose the following FCC Form 470 statement:	Then, choose the following FCC Form 470 statement:
Internet Access and Data Transmission Service	I seek bids for internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).	I seek bids for internet access and data transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service providers as independent services. ¹
Cellular Data Plan/Air Card Service	I seek bids for internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).	I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have existing broadband internal connections. ²

¹ Applicants can use the narrative field on the FCC Form 470 and/or their RFP, if applicable, to provide additional details regarding their service need requirements.

² Cellular data plans and air cards for mobile devices are eligible only when the applicant seeking support demonstrates that the individual data plans are the most cost-effective option for providing internal broadband access for mobile devices at schools and/or libraries.

If you intend to request bids for:	You should first select “I seek bids for internet access and/or data transmission service.” Next, choose the following FCC Form 470 statement:	Then, choose the following FCC Form 470 statement:
Standalone Internet Access Service	I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required. ³	N/A
Standalone Data Transmission Service	I seek bids for data transmission service only (i.e., that does not include internet access service). ⁴	I seek data transmission service without internet access service.
Leased Dark Fiber and Leased Lit Fiber	I seek bids for data transmission service only (i.e., that does not include internet access service). ⁵	I seek to lease capacity, e.g., a specific number of dark fiber strands or capacity over a leased lit network that will be used for data transmission service.
Self-Provisioned Network (Applicant Owned and Operated Network) and Services Provided Over Third-Party Networks	I seek to build my own network.	N/A

If you intend to request bids for:	You should first select the following FCC Form 470 statement:	Then, choose the following FCC Form 470 statement:
C1 Network Equipment	I seek bids for Category One network equipment or maintenance and operations.	I own or lease my own network or network capacity and seek bids for the electronics to make the network functional.

³ This is not a commonly selected service option. It does not include transport service, which may be needed to deliver Internet access to the school or library building.

⁴ This service option does not include Internet access service. If this option is selected, the applicant will have to request Internet access service separately.

⁵ This service option does not include the modulating equipment needed to light the dark fiber; applicants are responsible for requesting modulating equipment separately.

If you intend to request bids for:	You should first select the following FCC Form 470 statement:	Then, choose the following FCC Form 470 statement:
C1 Maintenance & Operations	I seek bids for Category One network equipment or maintenance and operations.	I own or lease my own network and seek bids for maintenance and operations of the connections.

Category Two

If you intend to request bids for:	You should first select the following FCC Form 470 statement:	Then, choose the Function from the drop-down menu:
Internal Connections	<ul style="list-style-type: none"> I seek bids for the equipment needed for broadband connectivity within schools and libraries and/or the related software and right-to-use licenses necessary for the equipment to function.⁶ 	<ul style="list-style-type: none"> Antennas, Connectors, and Related Components Cabling Caching & Necessary Software & Licenses Firewall Service, Components, & Necessary Software & Licenses Racks Routers & Necessary Software & Licenses Switches & Necessary Software & Licenses Uninterruptable Power Supply/Battery Backup & Necessary Software & Licenses Wireless Access Points & Necessary Software & Licenses

⁶ If only requesting software necessary to use the equipment (e.g., right-to-use software or client access licenses), the applicant can request these under Internal Connections and then select the option that identifies the specific type of internal connection (e.g., routers, switches, etc.) and necessary software and licenses. The fact that they are only requesting the software and not new equipment should be explained in the narrative field and included in the RFP, if applicable.

If you intend to request bids for:	You should first select the following FCC Form 470 statement:	Then, choose the Function from the drop-down menu:
Basic Maintenance of Internal Connections	<ul style="list-style-type: none"> I seek bids for basic maintenance service on eligible equipment and/or support services (e.g., bug fixes, software upgrades, and security patches) appropriate to maintain reliable operation.⁷ 	<ul style="list-style-type: none"> Antennas, Connectors, and Related Components Cabling Caching Firewall Service and Components Racks Routers Switches Uninterruptable Power Supply/Battery Backup Wireless Access Points Wireless Controllers

If you intend to request bids for:	You should first select the following FCC Form 470 statement:	Then, choose the following FCC Form 470 statement:
Managed Internal Broadband Services (MIBS): Leased Equipment	I seek bids for the operation, management, and monitoring of eligible broadband internal connections.	I seek bids for MIBS using equipment that I currently lease or will lease.
Managed Internal Broadband Services: Existing Equipment	I seek bids for the operation, management, and monitoring of eligible broadband internal connections.	I seek bids for MIBS using equipment that I currently own or will own.

⁷ If requesting a maintenance support subscription (e.g., bug fixes and security patches), the applicant can request these under Basic Maintenance of Internal Connections.

E-rate CABIO Internet Form 470 Bidding Exemption Guide FY 2024



October 2023

1

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option

- Schools and libraries seeking “Commercially-Available Business Class Internet Services” are not required to file a Form 470
- Commercially Available means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
 - In layman’s terms, this means an internet service that is available on a vendor’s website for its business customers.
 - Typically, only Cable-Modem, DSL, or a shared Internet Service
- Minimum speeds must be 100 Mbps downstream and 10 Mbps upstream per building
- Cost must be \$3,600 or less annually (pre-discount) per building
 - Cost must be per-building and cannot be averaged across multiple buildings
 - \$3,600 includes any installation costs, equipment rental, taxes and fees

The CABIO option is geared toward small libraries and small schools not on the State Network and that are using cable modem-type services

Form 471 Answers for CABIO

Funding Request Key Information

Please enter a Funding Request Nickname here *

Is this Funding Request a continuation of an FRN from a previous funding year?*

If you mark YES, system will ask for your FY 2022 FRN number

Previous Year FRN Number*

2299000037

Copy FRN **Awesome feature!**

If you want to copy an existing Funding Request, select Copy FRN below. Note that if an FCDL has been issued for the FRN, the approved version of the FRN will be copied.

If you used CABIO last year and if your speeds/vendor/amounts haven't changed from last year, you can use the COPY FRN feature to pre-populate your FY 2023 FRN! *Only use this if you used CABIO last year.*

Search for FRN System will then ask for your FY 2022 Form 471 or FRN number to gather the required information

Search by FCC Form 471

Search by FRN Number

CABIO, MTM Services

- **MTM Services:** Applicants can elect to purchase CABIO services on a month-to-month basis and not sign a contract
 - Proceed directly to the Form 471

FRN Contract

How are the services for this FRN being purchased?

Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN.

CABIO, Contracted Services

- **Contracted Services:** Applicants using CABIO *may* sign vendor contracts, but they're not required
 - Can be multi-year contract
 - If a new contract is signed, the applicant should first create a Contract Record in EPC (<http://e-ratepa.org/?p=34001>), then proceed to the Form 471 and follow these steps on the Form 471 to link the FRN to the Contract Record:

FRN Contract

How are the services for this FRN being purchased?
Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN.

CONTRACT ✓ TARIFF MONTH-TO-MONTH

Next, you will associate a contract to your FRN. Please search for a contract below and select one to associate it to the FRN.

Associate a Contract

Search by Creating Organization BEN:

Search by Nickname (All or Partial):

Search by Contract ID:

Search by Contract No.:

<input type="checkbox"/>	Contract ID	Contract Number	Nickname	Award Date ↓	Creating Organization BEN
<input checked="" type="checkbox"/>	7321		FY22 – Internet - Zito	1/22/2023	108

More Form 471 Answers

Establishing FCC Form 470

How many bids were received?*

← List "0" bids were received

Enter the number of bids that you received for this product or service.

Was an FCC Form 470 posted for the product and/or services you are requesting?

YES NO ← Select NO – no Form 470 was posted. System will then know you're using CABIO

This is for a commercially available business class Internet access service exempt from the FCC Form 470 posting requirement.

E-rate RFP & Form 470 Narrative Guide



A Request for Proposal (RFP) is a bidding document that describes the project and requested services/equipment in sufficient detail so that potential bidders understand the scope, location, and any other requirements. USAC uses the term ‘RFP’ or ‘RFP document’ generically to refer to any bidding document that describes a project and requested services/equipment in more detail than in the fields provided on the Form 470. Applicants should consider *any* supplemental document, including Q & As, to be an RFP document, and therefore must follow the E-rate rules applicable to RFPs.

When are RFPs Required?

In general, RFPs are generally *recommended* for E-rate eligible services and equipment because there is typically too much information that vendors may need in order to prepare a responsive bid than can fit in the “narrative” box of the Form 470. Because E-rate rules require a fair and open competitive bidding process, the issuance of an RFP and establishment of a systematic way to field and respond to all vendor inquiries -- so that vendors have access to the same information -- can greatly assist applicants in documenting compliance with E-rate bidding rules.

E-rate rules *require* an applicant to release an RFP in these circumstances:

- 1) Category 1: Leased Dark Fiber or Self-Provisioned Fiber projects, Category 1 Network Equipment, and/or Operations & Maintenance Services for Leased Dark Fiber or Self-Provisioned Fiber Services.
- 2) Category 2: State or local bidding requirements that require an RFP.

If an RFP is issued, it must be uploaded at the time of the Form 470 filing. Further, all supplemental information provided to vendors or modifications to the information provided in the RFP must be uploaded as an RFP amendment to the original Form 470 filing, and the applicant’s bid due date must be extended to allow for all bidders to have access to all RFP information for at least 28 days. To upload an RFP amendment: EPC Landing Page > Locate, select Form 470 using search feature bottom of page > Related Actions > Add an RFP Document > Upload document.

What Should be Included in the RFP?

The actual content of the RFP can be broken down into two sections – information provided to bidders and information requested from bidders. The more detailed the information you provide, the better the quality of proposals should be. This document contains suggested RFP outlines for both Category 1 and Category 2 requests.

What Should be Included in the Form 470 Narrative if No RFP is Issued?

Suggested wording for the Form 470 narrative section is below for applicants not issuing an RFP. Note: If you don't upload an RFP when the Form 470 is initially released, due to EPC system limitations, it is not possible to upload any additional documents such as Q & A, changes to scope of work, etc.

What Are the Biggest Mistakes Applicants Make in their RFPs or Form 470s?

Category 1: Applicants select the wrong category of service for Internet access, don't include the service addresses, don't bid a range of bandwidths, don't mention a preferred technology, or don't seek bids for the range of services as required by their specific fiber request (see page 3). Applicants also forget to upload the additional vendor RFP information/addendum to their original Form 470 and then restart their 28-day clock.

Category 2: Applicants forget to bid "equivalent" services, don't create a 'basic maintenance' service request in addition to the internal connections equipment request on the Form 470, or don't include a description of their existing equipment so vendors bidding equivalent product lines know whether their proposed equipment will be interoperable. Applicants also forget to upload the additional vendor RFP information/addendum to their original Form 470 and then restart their 28-day clock.

Category 1



Category 1 consists of Internet access and data transmission services, including Leased Lit, Leased Dark and Self-Provisioned Fiber services, and special construction build-out charges (see below for special bidding requirements for fiber services).

Category 1 RFP Outline

A. Information to Provide to Vendors

- 1) Project Summary
- 2) Proposal deadline (date and time)
- 3) Proposal submission requirements including where and in what format to submit bids
- 4) Vendor pre-bid meeting date/time (if any), and if it is a mandatory or optional meeting
- 5) E-mail address where vendor questions must be sent and deadline for questions
- 6) Detailed scope of services/project (see below for special fiber requirements)
- 7) Bandwidth increases
- 8) Whether partial bids for some but not all of the service locations will be accepted
- 9) Service addresses
- 10) Term of contract, including specific number of voluntary extension years
- 11) Technical service/network configuration requirements
- 12) Disqualification factors
- 13) Requirements for service turn-up date
- 14) Administrative and legal requirements (background checks, etc.)
- 15) Detailed list of information vendors must submit with proposals (see next section)
- 16) A specific response template, such as an excel worksheet, for vendors to use when submitting their proposal (see examples below). This will limit irrelevant information and reduce the likelihood of receiving “boilerplate” responses.

B. Information to Request from Vendors

- 17) Detailed service proposal
- 18) Cost by service address and any special construction fee, and itemized taxes/fees
- 19) Service delivery date commitment and when installation, if any, will begin
- 20) Network map/diagram
- 21) Service level agreements and penalties
- 22) Example of invoice and description of online customer service portal, if any
- 23) Company history and financial information
- 24) References of in-state clients of similar size/nature providing these services
- 25) Cost of specific mid-contract bandwidth increases
- 26) E-rate experience and expertise
- 27) Whether the vendor will provide discounted bills

- 28) Identification of all RFP sections that are objectionable and alternative provisions in place of any objectionable requirement

Fiber RFP Requirements:

- ✓ **Leased Dark Fiber RFP Requirements:** If you are seeking a Leased Dark Fiber network, E-rate requires you to also seek bids for Leased Lit Fiber in the same RFP and then compare all bids received. Applicants are not permitted to indicate a preference in their RFP. The modulating electronics/equipment necessary to make the Dark Fiber service functional and the ongoing operations/maintenance of the Dark Fiber service are eligible to be purchased with Category 1 funds and RFPs should seek quotes for these items, if needed. Typically, such RFPs will request proposals for a specific Leased Lit Fiber bandwidth, while Dark Fiber networks will seek pricing to lease a certain number of strands to each building (2 or 12 strands to each location, typically). Applicants also must seek pricing for an extended period of service for both services to be able to do an apples to apples comparison.

- ✓ **Self-Provisioned Fiber RFP Requirements:** If you are seeking to contract with a vendor to install fiber between buildings where you will then own that fiber, E-rate requires you to seek bids for “all 3rd party services” in the same RFP and then compare all bids received. The term ‘3rd party services’ basically means all other possible data transmission technologies. The modulating electronics/equipment necessary to make the self-provisioned fiber circuit(s) functional and the ongoing operations/maintenance of the fiber are eligible to be purchased with Category 1 funds and RFPs should seek quotes for these items, if needed.

- ✓ **Leased Lit Fiber Bidding Requirements:** E-rate rules do not require an RFP, nor the comparison with any other data transmission service, when seeking just Leased Lit Fiber services. However, an RFP is strongly recommended due to the amount of information that vendors will need in order to submit a responsive proposal.

Reminder: If a vendor submits questions about the RFP and your answer provides additional information not found in the RFP, that information must be publicly posted in EPC as an addendum to your RFP. This addendum also restarts the 28-day ‘clock.’ Failure to post questions and answers that contain new information or failure to wait 28 days after posting of the questions and answers to evaluate bids is a violation of E-rate’s fair and competitive bidding rules which can result in the denial of a funding request.

C. Sample Vendor Response Templates for Category 1

Leased Lit Fiber

APPENDIX A		To be completed by bidder:			
DESCRIPTION OF SERVICE - Leased Lit Fiber to each building as identified in RFP. Bandwidth:	# CIRCUITS	UNIT MONTHLY RECURRING COST/CIRCUIT Years 1 - 5	MONTHLY TAXES/FEES	ONE-TIME NON- RECURRING COST/SPECIAL CONSTRUCTION COST	WILL SERVICE BE AVAILABLE ON JULY 1, 2021? Y/N
1 Gbps	6	\$	\$	\$	
10 Gbps	6	\$	\$	\$	

Leased Lit Fiber & Leased Dark Fiber

APPENDIX A		To be completed by bidder:						
DESCRIPTION OF SERVICE - Leased Lit Fiber to each building as identified in RFP. Bandwidth:	# CIRCUITS	UNIT MONTHLY RECURRING COST/CIRCUIT Years 1 - 5	MONTHLY TAXES/FEES	ONE-TIME NON- RECURRING COST/SPECIAL CONSTRUCTION COST	UNIT MONTHLY RECURRING COST/CIRCUIT Years 6 - 20	WILL SERVICE BE AVAILABLE ON JULY 1, 2021? Y/N		
1 Gbps	6	\$	\$	\$	\$			
10 Gbps	6	\$	\$	\$	\$			

To be completed by bidder:								
DESCRIPTION OF SERVICE	# STRANDS TO EACH BUILDING	UNIT MONTHLY RECURRING COST/BUILDING	MONTHLY TAXES/FEES	ONE-TIME NON- RECURRING COST/SPECIAL CONSTRUCTION COST	UNIT MONTHLY RECURRING COST/CIRCUIT Years 6 - 20	COST OF C1 NETWORK EQUIPMENT	COST OF MAINTENANCE /OPERATION OF DARK FIBER	WILL SERVICE BE AVAILABLE ON JULY 1, 2021? Y/N
Leased Dark Fiber to each building as identified in RFP	2	\$	\$	\$	\$	\$	\$	

Internet Access

APPENDIX A	To be completed by bidder:				
DESCRIPTION OF SERVICE - Internet Access delivered via fiber to district head-end as identified in RFP. Bandwidth:	MRC for 2 Year Contract	MRC for 3 Year Contract	MRC for 5 Year Contract	ONE-TIME NON- RECURRING COST/SPECIAL CONSTRUCTION COST	WILL SERVICE BE AVAILABLE ON JULY 1, 2021? Y/N
1 Gbps	\$	\$	\$	\$	
2 Gbps	\$	\$	\$	\$	
3 Gbps	\$	\$	\$	\$	

No RFP? Sample Category 1 Form 470 Narrative Language

It is strongly recommended that you include the following basic information in your Form 470 narrative text box if you choose not to issue an RFP (maximum of 5000 characters):

- Description of service, minimum and maximum bandwidth speeds, and number of lines.
- Minimum length of term, and any voluntary extension options
- Request for specific expanded or increased bandwidth prices during the life of the contract
- Building name and addresses where service is needed. Include the network hub building if the service needs to go back to the hub site.
- Any minimum bid (disqualification) factors that must be met in order for the vendor's bid to be qualified for review and scoring. These factors must be answerable as yes/no and cannot be subjective.

A. Internet Access w/Fiber Transport

FY 2024 Form 470 Required Selections:

Level A: I seek bids for internet access and/or data transmission service (1st bullet)

> **Level B:** I seek bids for internet access and data transmission service... (1st bullet)

> **Level C:** I seek bids for internet access and data transmission service... (1st bullet)

Form 470 Narrative: We are requesting symmetrical Internet access delivered over leased lit fiber. Service should be terminated at [name and address of district hub]. Pricing should be included for [xxx bandwidth increments]. We are seeking [2, 3, or 5] year contract options, with [2] one-year renewal options. Contracts must allow for upgrades to quoted bandwidth throughout the terms of the contract without additional bidding. Proposals must include description of service outage reports and method for customer to report service outages, in addition to what technical support is included without additional service fees, and a proposed service level agreement.

All costs must be included and proposals that say "additional charges may apply" will be disqualified. All special construction charges must be outlined in the bid response. The non-discounted portion of any special construction charges will be required to be amortized over four years. Proposals must disclose whether any services/circuits are being leased from a 3rd party and if so, name that 3rd party. Additional reasons that a proposal may be disqualified are [list disqualification reasons here].

Proposals due by [date/time – be sure it is at least 29 days after 470 posting date] to [e-mail address]. All questions must be submitted via e-mail to [e-mail address].

B. Internet Access w/Cable Transport (if not using CABIO bidding exemption*)

FY 2024 Form 470 Required Selections:

Level A: I seek bids for internet access and/or data transmission service (1st bullet)

> **Level B:** I seek bids for internet access and data transmission service... (1st bullet)

> **Level C:** I seek bids for internet access and data transmission service... (1st bullet)

Form 470 Narrative: We are requesting bundled Internet access delivered over coaxial cable or equivalent transport. Service should be terminated at [name and address of district hub]. Pricing should be included for [xxx bandwidth increments]. We are seeking contract and MTM pricing proposals.

All costs must be included and proposals that say “additional charges may apply” will be disqualified. All special construction, installation or “turn-on” charges must be outlined in the bid response. The non-discounted portion of any special construction charges will be required to be amortized over four years. Additional reasons that a proposal may be disqualified are [list disqualification reasons here].

Proposals due by [date/time – be sure it is at least 29 days after 470 posting date] to [e-mail address]. All questions must be submitted via e-mail to [e-mail address].

* CABIO Bidding Exemption

Schools and libraries are exempted from the E-rate competitive bidding process if they purchase a commercially-available Internet package that meets the following conditions:

- Package costs less than \$300 per month, per building (pre-discount)
- Minimum speed must be 100 mbps downstream and 10 mbps upstream
- Cost must be based per building and cannot be averaged across multiple buildings
- “Commercially available” typically means you can look on a vendor’s website and see the bundled Internet package that is generally available to the public
- If CABIO applies, applicants can proceed directly to the Form 471 filing if filing for MTM services, or to the Contract Record creation if signing a multi-year contract (then to the Form 471).

C. Leased Lit Fiber Circuits (WAN) – No Internet

FY 2024 Form 470 Required Selections:

Level A: I seek bids for internet access and/or data transmission service (1st bullet)

> **Level B:** I seek bids to purchase data transmission service only... (3rd bullet)

> **Level C:** I seek bids for data transmission service without internet access... (1st bullet)

Form 470 Narrative: We are requesting Leased Lit Fiber transport from the district hub location to each of the following locations for the purposes of a wide area network:

District hub site: [name of location, address]

[name of school #1, address]

[name of school #2, address]

[name of school #3, address]

[name of school #4, address]

[name of school #5, address]

Pricing should be included for [1 Gbps, 10 Gbps or both]. We are seeking [3, 5, 10] year contract options with [2, one-year renewal options]. Contracts must allow for upgrades to quoted bandwidth throughout the terms of the contract without additional bidding.

Proposals must include description of service outage reports and method for customer to report service outages, in addition to what technical support is included without additional service fees, and a proposed service level agreement.

All costs must be included and proposals that say “additional charges may apply” will be disqualified. Proposals must provide service to all buildings listed above. All special construction charges must be outlined in the bid response. The non-discounted portion of any special construction charges will be required to be amortized over four years. Proposals must disclose whether any services/circuits are being leased from a 3rd party and if so, name that 3rd party. Vendors must provide references from at least 3 PA school clients of the same approximate size. All taxes, fees, surcharges must be itemized separately and disclosed in the vendor proposal. Additional reasons that a proposal may be disqualified are [list disqualification reasons here].

Proposals due by [date/time – *be sure it is at least 29 days after 470 posting date*] to [e-mail address]. All questions must be submitted via e-mail to [e-mail address].

Category 2



Category 2 consists of three subcategories -- internal connections, basic maintenance of internal connections, and managed internal broadband services. The most widely used subcategory is internal connections which consists of switches, routers, wireless access points and controllers, cabling, firewall appliances, caching servers, UPSs, racks, including related installation/configuration, licenses and cloud-based functionality.

CATEGORY 2 RFP Outline

A. Information to Provide to Vendors

- 1) Project Summary
- 2) Proposal submission guidelines including deadline for vendor questions
- 3) Vendor pre-bid meeting date/time (if any), and if it is a mandatory or optional meeting
- 4) E-mail address where vendor questions must be sent
- 5) Detailed scope of services/project
- 6) Whether installation and/or configuration is required
- 7) Whether partial bids for some but not all of the equipment/services will be accepted
- 8) Statement that district retains the option to increase or decrease quantities based on current budget conditions
- 9) Floorplans of each building with data closets labeled (for C2 that involves structured cabling, installation services, or managed internal broadband services)
- 10) Disqualification factors
- 11) Compatibility/interoperability requirements with school's existing network equipment *
- 12) Requirements for installation timeline
- 13) Administrative and Legal Requirements (background checks, etc.)
- 14) Detailed list of information vendors must submit with proposals (see next section)
- 15) A specific response template for vendors to use when submitting their proposal (see example below). This will limit irrelevant information and reduce the likelihood of receiving "boilerplate" responses.

*** Important:** Applicants may indicate a preferred manufacturer but must also use the phrase "or equivalent" and then evaluate all bids that meet the minimum bid requirements outlined in the RFP. Applicants are permitted – and encouraged - to include the requirement that the proposals must be compatible with a specific manufacturer's equipment or service that is installed in your network, and then include a list of the existing equipment. Also, applicants may require that proposals for "equivalent bids" are required to provide in their bid response documentation to substantiate that the equipment does have comparable specifications and is compatible with existing network equipment.

B. Information to Request from Vendors

- 16) Detailed service proposal if installation and/or configuration are required, and for all cabling projects
- 17) Unit cost of equipment or network drop
- 18) Ongoing licensing and maintenance costs
- 19) Percentage of E-rate eligibility (firewalls, licenses, and maintenance)
- 20) Service delivery date commitment and when installation, if any, will begin
- 21) Network map/diagram (for structured cabling, equipment installation)
- 22) Example of invoice and description of online portal if any
- 23) Company history and financial information
- 24) References of in-state clients of similar size/nature providing these services
- 25) Documentation to substantiate any “equivalent bid” is comparable to preferred make/model and is compatible with the district’s existing network equipment
- 26) Whether the vendor will offer discounted bills

Reminder: If a vendor submits questions about the RFP and your answer in any way changes the RFP or provides additional information than what was given in the RFP, those questions and answers must be publicly posted as an addendum to your RFP. This addendum also restarts the 28-day Form 470 clock. Failure to post questions and answers publicly or failure to wait 28 days after posting is a violation of fair and competitive bidding. This can result in the denial of a funding request.

C. Sample Vendor Response Template – Internal Connections

APPENDIX A			To be completed by bidder:			Only required for vendors bidding product line different than preferred manufacturer		
Preferred Manufacturer Name or Equivalent	Model Number (SKU)	Estimated Quantity	Price/Unit	Extended Price (quantity * unit price)	% E-rate Eligible	Equivalent Make	Equivalent Model	Has the equivalent equipment met the compatibility requirements listed below, if any, and have you attached the required proof of quality and functionality equivalency? Yes/No
Cisco or equivalent	C9115AXI-B-EDU	211	\$	\$	%			
Cisco or equivalent	AIR-AP-BRACKET-1	211	\$	\$	%			
	Installation per WAP	211	\$	\$	%			
TOTAL BID				\$0.00				

If vendors are bidding an "equivalent" product line that is different than what is listed in Column A, the products must be equivalent in quality and functionality, and must be fully interoperable and compatible with the District’s existing equipment/systems which are as follows: District's existing EIGRP protocol and cisco wireless and switching equipment infrastructure.

No RFP? Sample Category 2 Form 470 Narrative Language

A. Category 2 Internal Connections

Form 470 Narrative: We are requesting vendor proposals for the following equipment [list equipment description, model numbers, and quantities, if known. If not known, describe what functionality you need such as wireless internal network for 12 classrooms.] District is [or is not] seeking installation of equipment. Equipment will be located in the following buildings [list name of buildings and addresses]. District retains the option to increase or decrease quantities based on current budget conditions.

Our preferred manufacturer is [manufacturer name] or equivalent. Equivalent proposals must be comparable in quality and functionality and must be fully interoperable with our existing [name of school/library's existing equipment]. Bids for an alternative manufacturer must also explain, in detail, that the equipment included in the proposal is equivalent to the preferred manufacturer equipment. The bid specification sheets for the alternative manufacturer equipment must be included in the bid. Alternative manufacturer equipment proposals that do not include this information will be rejected due to failure to comply with the minimum bid requirements.

Bids must include all charges, including equipment costs itemized by component, shipping and any surcharges. Labor/installation, if requested as part of the service request, shall be itemized separately.

Vendor must indicate whether licenses and or operating system software of internal connections equipment are classified as maintenance or internal connections.

Additional reasons that a proposal may be disqualified are [list disqualification reasons here].

Proposals due by [date/time – be sure it is at least 29 days after 470 posting date] to [e-mail address]. All questions must be submitted via e-mail to [e-mail address].