SCHOOLS AND LIBRARIES PROGRAM
NEWS BRIEF

January 22, 2016

TIP OF THE WEEK: The invoice deadline for FY2014 non-recurring services is next Thursday, January 28. You must either submit your invoice (for BEAR Forms, this includes the service provider approval) or submit an invoice deadline extension request on or before January 28.

Commitments for Funding Year 2015

Funding Year 2015. USAC will release Funding Year (FY) 2015 Wave 34 Funding Commitment Decision Letters (FCDLs) on January 28. This wave includes commitments for approved requests for all service types and at all discount levels. As of January 22, FY2015 commitments total over $2.94 billion.

On the day the FCDLs are mailed, you can check to see if you have a commitment by using USAC's Automated Search of Commitments tool.

Assigning User Rights to File the FCC Form 470

In order for you to be able to file an FCC Form 470 in EPC, the following must occur:

- A user account must be created for you in EPC. The account administrator for your organization can create a new user account. If you don't have an account administrator or you're not sure whether you have a user account, check with the Client Service Bureau at (888) 203-8100.
- You must have full rights or partial rights in order to file an FCC Form 470. Your account administrator can grant you those rights if you don't already have them (see below).
- You must respond to the email generated by USAC to create a user ID and password. The Logging In video on the USAC website demonstrates the complete login process.
- You must log in to EPC with your new password and accept the Terms and Conditions of use for EPC. Until you complete this step by clicking the "Accept" button at the bottom of the Terms and Conditions, you will not show up as a user on your organization account. To access and accept the Terms and Conditions, you can either:
    - click on the link in the Welcome message you see under your News tab when you log in or
    - go to your Tasks tab and click on the task labeled "Complete Terms and Conditions."

If you are the account administrator and you cannot file an FCC Form 470, you can grant yourself that right.

- Select "Manage Users" from the landing page.
- Check the box to the left of the appropriate organization from the list of "Existing Organizations" and then click "Manage User Permissions."
- Find your name in the "User Permissions" table, then navigate to the field in that row in the "Apply All" column.
- Use the dropdown menu to assign full or partial rights to yourself. Note that the only difference between a full-rights user and a partial-rights user is that a full-rights user can certify program forms.
- Click the green "Submit" button at the bottom of the page.

To assign full or partial rights to another user, follow the steps above but choose that user's name from the "User Permissions" table. You can assign full or partial rights across the board using the dropdown in the "Apply All" column, or assign rights specific to the FCC Form 470 using the dropdown in the "470 Permissions" column. Be sure to click the "Submit" button after you have made your choice(s).

Additional FCC Form 470 Reminders

After you have verified that you can file an FCC Form 470 (i.e., the option "FCC Form 470" appears at the top of your landing page when you log in to EPC), you can start the FCC Form 470 process in EPC.

Check first to make sure that your organization's profile information in EPC is correct and complete. The FCC Form 470 will populate information about your organization – including the number of entities associated with your organization – into the FCC Form 470 as you start to file the form. This information must be corrected in your profile; you cannot correct it in the form.

Below is some additional information to keep in mind about the FCC Form 470 and the competitive bidding process that it opens:

What is the purpose of the FCC Form 470?

Applicants post an FCC Form 470 to the USAC website to describe the services they are seeking for the upcoming funding year and, for multi-year contracts, beyond the first funding year – in general, services that start on or after July 1, 2016. Service providers can then review the information on posted FCC Forms 470 and, if they are interested, submit bids in response to the information provided.

How long does the FCC Form 470 need to be available?

You must wait at least 28 days after an FCC Form 470 is posted to the USAC website before you:

- Evaluate the bids you have received and choose the most cost-effective bid to select your service provider.
- Sign a contract (if applicable).
- Sign and submit your FCC Form 471 to request discounts on eligible services.

What must I do if I issue a Request for Proposal (RFP) or similar bidding document?

Starting with FY2016, if you issue an RFP, you are required to upload a copy of that RFP to your FCC Form 470. Keep in mind that we use the terms "RFP" and "RFP document" generically to refer to any bidding document that describes your project and requested services in more detail than that provided in the data entry fields on the FCC Form 470. An RFP document can be a formal bidding document – for example, an Invitation for Bid (IFB) or Request for Quote (RFQ) – or it could be any document issued as part of your competitive bidding process to provide more information to potential bidders.

If you issue additional RFP documents after you have certified your form, you must also upload those documents to your form. To do this, click on the nickname of your form from the list of forms at the bottom of your landing page, choose "Related Actions" from the left-hand menu, then click "Upload RFP Documents" and follow the instructions provided. If, however, the additional RFP documents alter the scope of the procurement, you must post a new FCC Form 470 with all the RFP attachments to ensure an open and fair competitive bidding process (see below). Note that you cannot upload an RFP document to a certified form if you indicated on that that form that you did not have an RFP.

If I issue an RFP, how long must it be available?

The RFP must be available for at least 28 days. Note that the RFP and the FCC Form 470 must remain available during the SAME 28-day period. For example, if you issue an RFP on January 1 and post an FCC Form 470 to the USAC website on January 15, you must wait at least 28 days after January 15 before you perform the activities described above.

What is an "open and fair" competitive bidding process?

An "open and fair" competitive bidding process means that, at a minimum:

- All bidders are treated the same.
- No bidder has advance knowledge of the project information in your competitive bid.
- There are no secrets in the process – such as information shared with one bidder but not with others.
- All bidders know what is required of them.

You should review the guidance in [Competitive Bidding](#) on the USAC website for more information.

How much detail should I provide about the services sought?

You should provide sufficient detail for a potential bidder to understand the size and scope of your project and the services you are requesting so that he or she can submit a responsive bid. You may want to include a website address or other mechanism where you can post answers to any questions you receive so that they are available to all potential bidders.

Note also that you cannot specify makes and model numbers from a specific manufacturer without adding the words "or equivalent." The online FCC Form 470 already includes this wording.

After you close your competitive bidding process, you must evaluate all bids received, including those that provide an equivalent solution.

Am I required to respond to every email or phone call from a service provider?

You should be prepared to respond to requests for the information necessary for a service provider to submit a responsive bid. For more information on this topic, refer to the [December 11, 2015 SL News Brief](#).

How do I evaluate the bids I receive?

You can use one or more bid evaluation criteria to evaluate your bids. The one criterion you must include – which also must be weighted more heavily than any other single criterion – is the price of the products and/or services that are eligible for E-rate discounts. You can find specific information on [constructing an evaluation](#) and a [sample bid evaluation matrix](#) on the USAC website.

Do I have to sign a contract?

You can receive services provided under tariff or on a month-to-month basis without signing a contract. Note that, in general, you are required to post an FCC Form 470 every year for these services.

You can also sign a contract. The contract can cover more than one year and/or can include voluntary extensions. As long as the services you desire for the upcoming funding year are covered by a multi-year contract or a contract for which you have already agreed with your service provider to exercise a voluntary extension, you can cite the establishing FCC Form 470 that led to the contract rather than posting a new FCC Form 470.

- You should verify that the contract or the extension covers the entire funding year. If not, you will need to post an FCC Form 470 for the services to be received for the period not covered by the contract or the extension.

Note that there is an exemption from posting an FCC Form 470 for certain Internet access services, whether those services are provided under contract, under tariff or on a month-to-month basis. See the "Exemption from Filing an FCC Form 470" section of the [Competitive Bidding](#) guidance document for more information.

Can a consultant help me with the competitive bidding process?

You can authorize a consultant – a non-employee of the entity applying for funding that assists in filling out the application materials for a fee – to assist you with the competitive bidding process. You should have a contract, letter of agency, or similar document with your consultant that explicitly states the actions that the consultant is authorized to take on your behalf.

Remember that consultants must obtain a [Consultant Registration Number (CRN)](#). You must also associate your consultant with your organization in your organization's account so that the consultant's information will be included on your FCC Form 470.