

# MBLC FY2024: E-rate Bid Evaluation and Form 471

Massachusetts Board of Library Commissioners  
January 26, 2024

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## Before We Start...

- Slides/Updates:
  - Accurate to the best of our knowledge as of 1/22/2024) but...expect more changes
- Most updates are in SLD's News Brief issued weekly
  - Subscribe or view online on SLD web site (<https://www.usac.org/e-rate/learn/news-brief/>)
- Basic training videos and related materials available online at from USAC at <https://www.usac.org/e-rate/learn/>

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## Before We Start...

- Questions are welcome throughout!
  - Please put your question in the chat (click "chat" at the bottom of the screen"
  - Please try to note slide #'s if you have a question about them
  - We will take all the questions at the end of the training, but if something is urgent, please interrupt!
  - Consultant will be available after the webinar finishes recording to answer further questions

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## Quick Preview of Today

- What's New?
- Process Overview
- Bid Evaluation
- Contracts (incl. ITT72)
- Form 471
- Q&A

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## What's New

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## What's New: January 2024

- Eligible Services List was released December 15, 2023
- FY2024 (7/1/24 – 6/30/2025) Form 471 Window is open
  - Closes March 27, 2024
- Tribal Libraries Order (FCC 23-56)
  - Up to \$3,600 in C2 (per location) without Form 470
  - 90% Internet access "safe harbor" on cost allocation
- Multiple open issues at FCC
  - Cybersecurity/Advanced Firewalls Pilot
  - Hotspots for students and patrons
  - Schoolbus Wi-Fi (with possible implications for bookmobiles)

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# Quick Application Process Overview

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# Application Process in a Nutshell

- Procurement: **Form 470** and (optional) RFP
  - Bid Evaluation and Contract Award
- Application for Funding: **Form 471**
  - PIA review and award of funding (FCDL)
- Notification of Services Starting: **Form 486**
  - Receipt of services and compliance with CIPA
- Invoicing: **BEAR (Form 472)** or **SPI (Form 474)**
- Post-Invoicing: Audits, reviews, etc.

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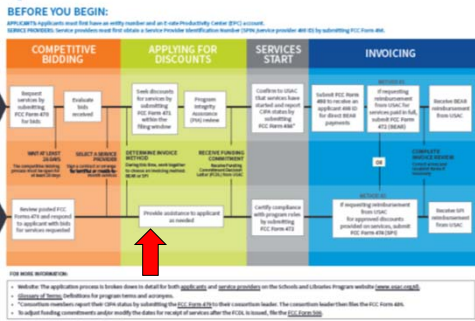
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## Schools and Libraries (E-rate) Program APPLICATION PROCESS



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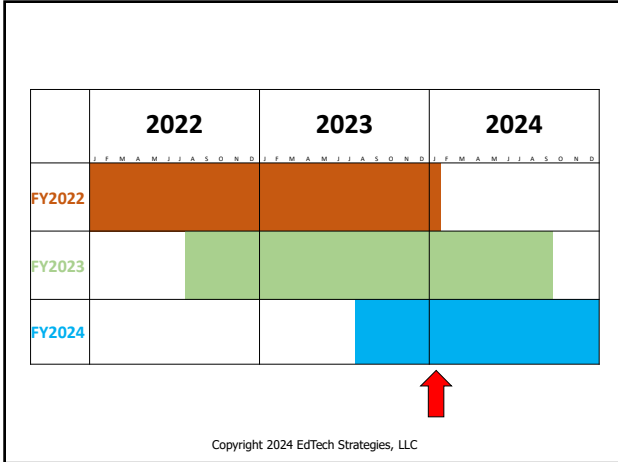
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## Application Steps and Deadlines

- Dates are somewhat flexible (but deadlines are not)
- Procurement/competitive bidding: Fall and early Winter prior to the Funding Year (includes Form 470)
- Contract Award and Form 471: ~Jan – Mar prior to the Funding Year (FY2024 471 Window: 1/17/2024 – 3/27/2024)
- Form 486: ~Summer/early Fall of Funding Year
- Invoicing: either during or ~Summer/Fall after Funding Year

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## Bid Evaluation/Vendor Selection Review

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## Bid Process Review

- RFP/Form 470
- Q&A/Walkthroughs
- 28 day waiting period
- Bid evaluation
- Vendor selection/bid award
- Contract
- Form 471

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## Bid Process Importance

- Fair and open competitive bidding the cornerstone of the program
  - Fair: every vendor evaluated fairly and equally
  - Open: any vendor who is interested and qualified can access the bid documents and respond
- Failures extremely difficult to cure

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## Bid Evaluation Criteria

- Must use bid evaluation matrix with criteria
- Criteria are largely flexible
  - Must use same criteria for all bidders *on a particular service*
  - Price of **eligible goods and services** must be the **primary factor**
    - Weighted more heavily than any other single factor
    - Does not need to be the majority of the points
    - Incorporate upgrade prices if applicable
  - Should be outlined in RFP if applicable
- Sample matrices available from USAC

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## Sample Bid Evaluation Criteria

Bid Evaluation Criterion	Points
Vendor bid response meets format requirements	10
Price of Eligible Goods and Services	30
Price of Ineligible Goods and Services	5
Vendor References	10
Vendor Reputation / Past Experience	15
Vendor Acceptance of Terms and Conditions	10
Vendor Description of Services / Meets Needs Expressed in Statement of Work	20
<b>TOTAL:</b>	<b>100</b>

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## Bid Evaluation Process

- **When to Evaluate:**
  - After bid is closed (after 28 days is up, either specified in RFP or chosen if no RFP)
- **What to Evaluate:**
  - Submitted, responsive bids only
  - Non-responsive bids do not need to be evaluated (but document why non-responsive!)
- **Multistep?**
  - RFP may include pass/fail minimum requirements, then evaluation
  - Bids failing minimum requirements can be disqualified
- **Must sync with local/state requirements**

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## Bid Evaluation Documentation

- Outline and explanation of criteria (often part of RFP or separate memo) and evaluation process
- Bid evaluation worksheet(s)
  - Either one from each evaluator or one for the evaluation team
  - Can do one per vendor or a multivendor evaluation sheet
  - Signed and dated by appropriate party(ies)
  - Clearly show the winning vendor
- Notes/minutes/summary (check with counsel)

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## Bid Evaluation: Common Failures

- Failure to conduct bid evaluation
  - Must conduct even with only one bid!
- Failure to evaluate all bids
  - Keep copies of all bids
  - Document disqualifications
- Failure to justify results (esp. price)
  - Use math/proportions!
- Failure to allocate out ineligible costs/services
- Failure to document

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## Bid Evaluation: Reminders

- Make sure your procurement staff/personnel responsible for contracts are involved and understand E-rate vis-à-vis local process
- Sample bid evaluation matrices available from USAC
- Cost allocate out any "free" or ineligible services from the eligible price
- Choose your criteria such that they work for you

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## Vendor Selection / Bid Award

- Selection of winning vendor should be simple: most points = winning vendor
  - Must comply with this requirement!
- Follow local requirements re: vendor notification
- Winning vendor is first in line
  - Reach out to negotiate contract
  - If you can't reach agreement, can go to second place vendor

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# Contracts

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# Contracts

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- Not all vendors require contracts – but most do
- Leave plenty of time for contract negotiation
  - Vendor contracts written to benefit vendors and often aren't e-rate compliant
- Incorporate terms and conditions from RFP (if applicable) as well as bid response
  - Ensure consistency as well as "fairness"
  - Attach documents as addenda
- Double check vendor's SPIN and red light status
- Ensure costs are clearly stated (including upgrade costs when appropriate)

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# Contracts (cont'd)

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- Ensure contract is approved/accepted by appropriate applicant authorities (and that approval is documented)
- Ensure contract is "fully executed" (has vendor and applicant signatures)
- Make sure contract is consistent with RFP, Form 470, and bid response
  - Pricing
  - Terms and conditions
- If you cannot reach agreement with winning vendor, move to second place vendor
- Contract must be fully executed/complete before filing Form 471
- **Contract can be multiyear, but cannot extend automatically**
- Contracts should be uploaded into EPC

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# Contracts Online Demo



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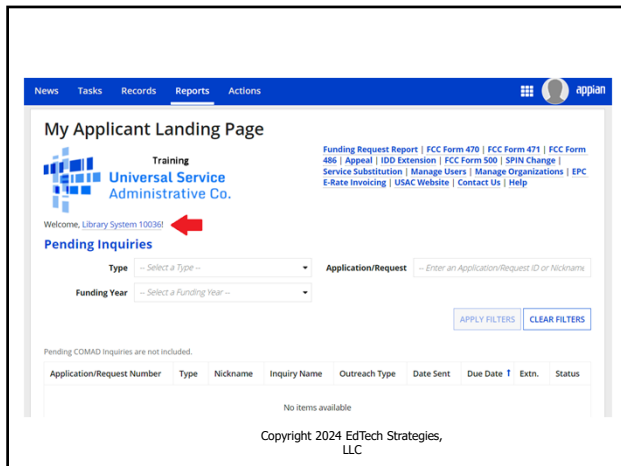
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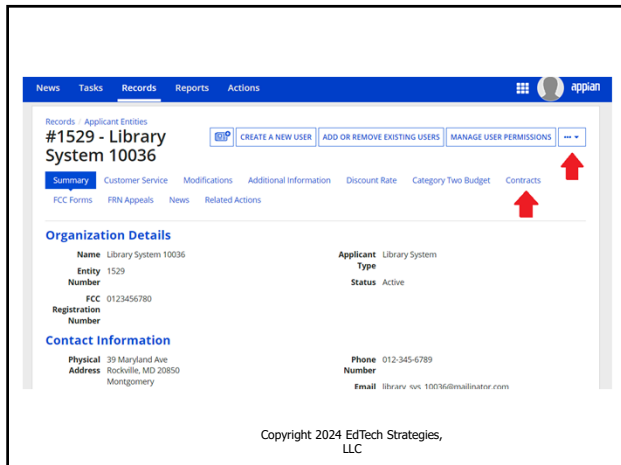
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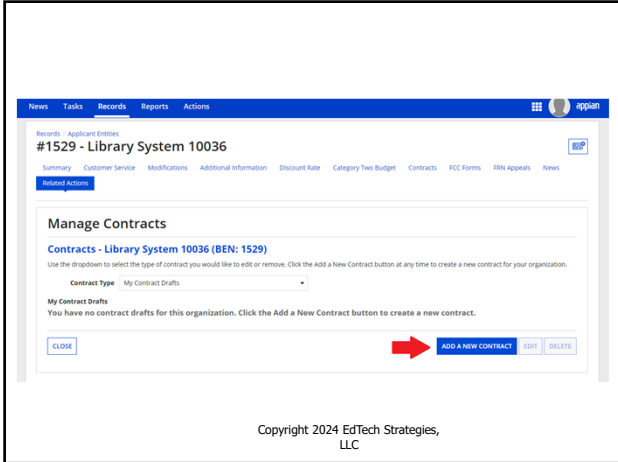
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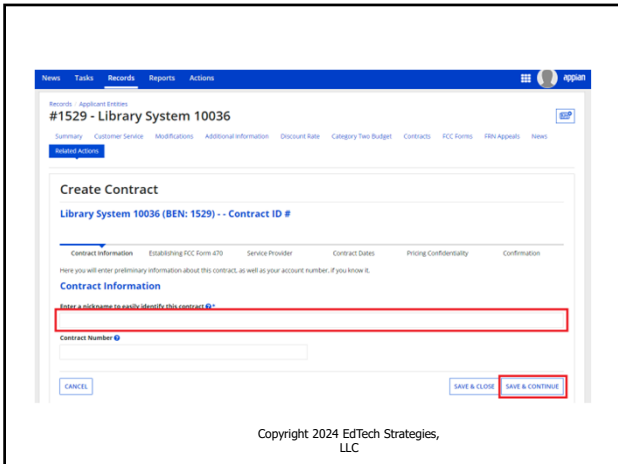
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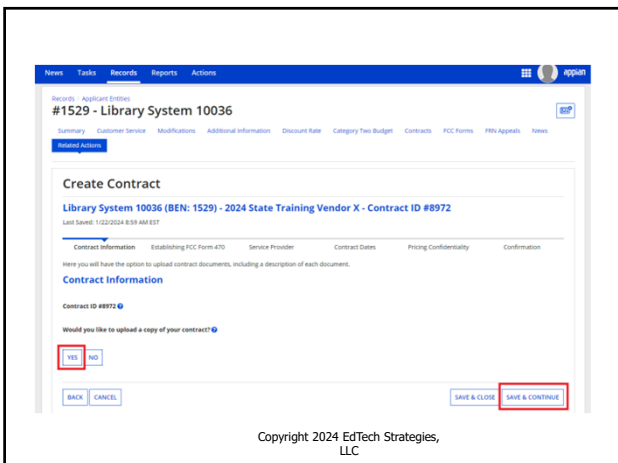
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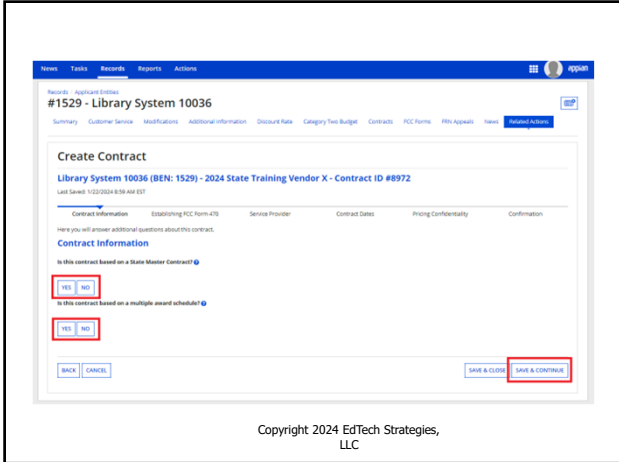
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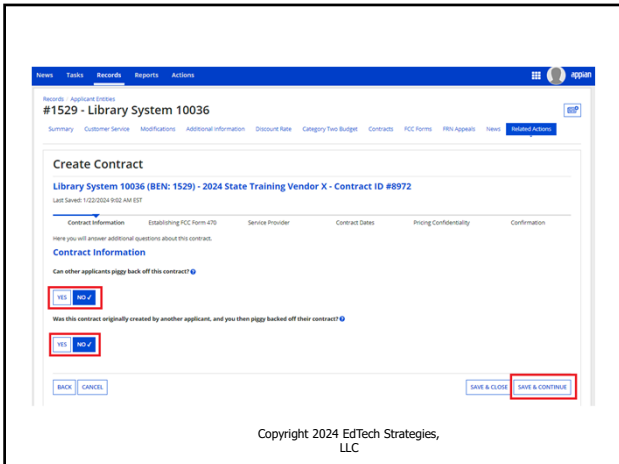
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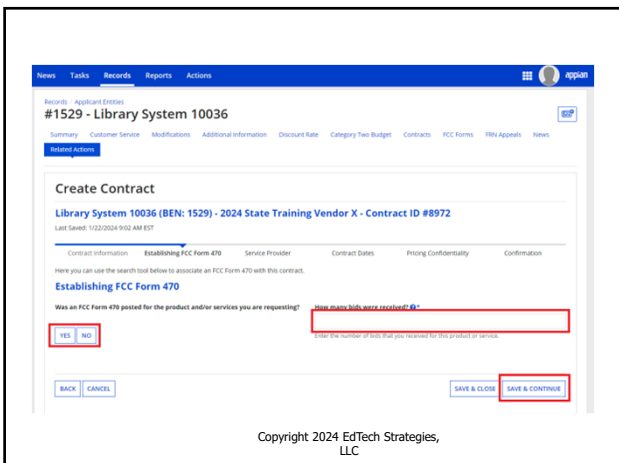
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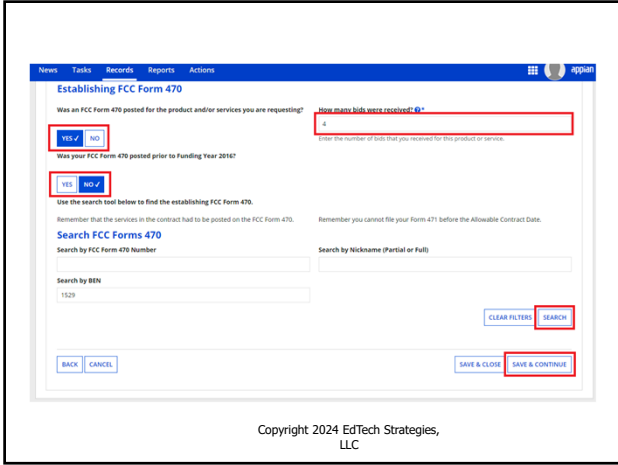
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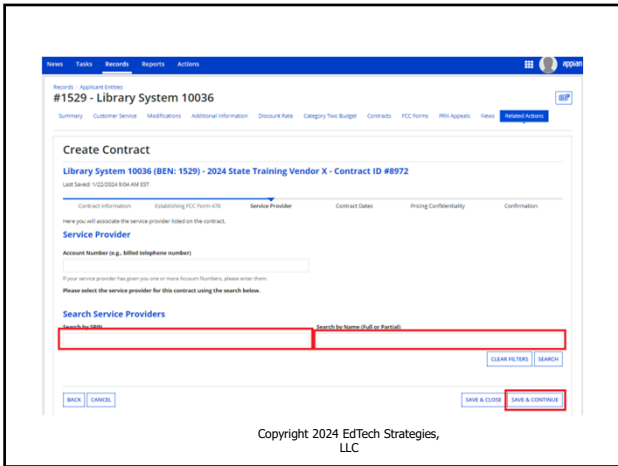
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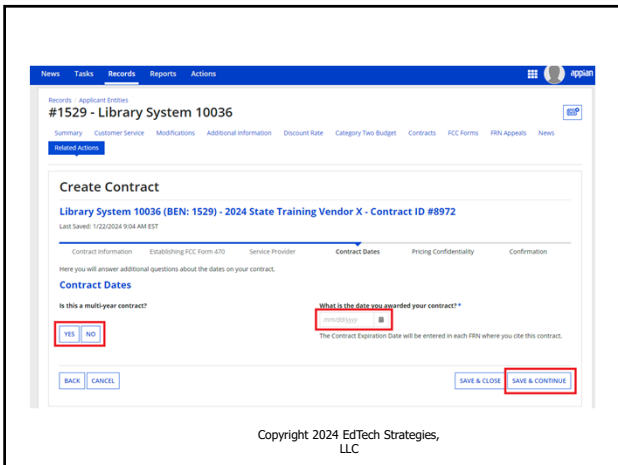
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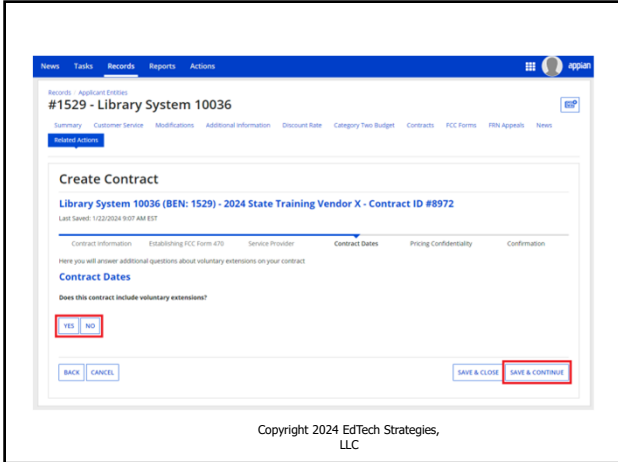
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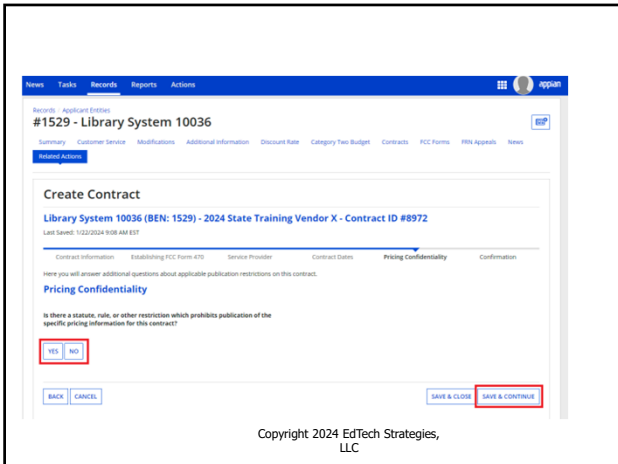
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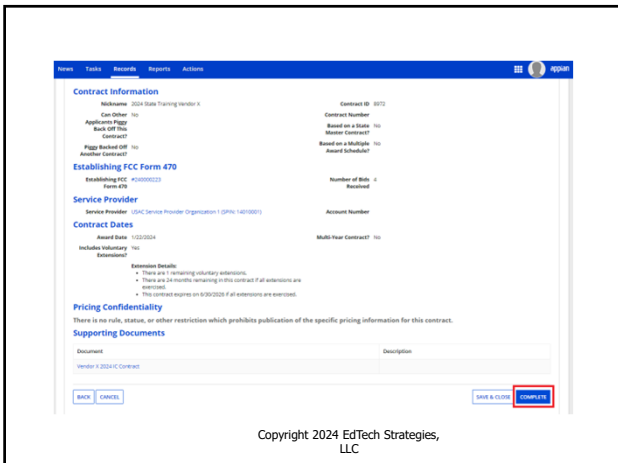
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## Using ITT72 State Master Contract

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## ITT72 State Master Contract

- ITT72 is a state master contract
  - Was bid and awarded by the Massachusetts Operational Services Division (OSD) for FY2020
  - OSD filed a Form 470, making it eligible for E-rate
  - Contract is a "multiple award schedule" contract (meaning multiple vendors were awarded for the same category of service)
    - Special rules exist for applicants seeking to purchase off ITT72
    - School districts have been using ITT72 in MA since 2020
  - Recommend only using ITT72 for Category 1 (Data Transmission/Internet Access) services

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## ITT72 Bidding

- Libraries do not file their own 470 to purchase off ITT72
- Instead, libraries must conduct a "mini-bid" process:
  - Determine service(s) you wish to purchase
  - Reach out to vendors and request bids
  - Conduct a bid evaluation with price as a primary factor
  - Award to the winning vendor
  - Negotiate and sign a contract with winning vendor
  - Create a contract record in EPC
  - Complete a Form 471

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## ITT72 Guide

- MBLC has a guide available online at <https://mbc.state.ma.us/programs-and-support/e-rate/state-contracts.php>
  - Guide includes step by step instructions, templates for services sought, template letters to vendors, vendor contact info, template bid evaluation matrix, sample award letter, and data for EPC contract module

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## ITT72 Funding Requests

- Guide includes all the information you need to complete the contract module once you have awarded to a vendor
- Once you have that information uploaded as a contract, you treat it like any other contract in EPC
- If you want to know more, or more help would be useful, let us know – happy to schedule training or one-on-one meeting

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## Form 471

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## Form 471 Overview

- Form 471:
  - Must be filed during the window (FY2024: 1/17/2024 – 3/27/2024)
  - Identifies the services on which applicant is seeking discounts
    - Only include one category of service per application (i.e. C1 separate from C2); can file multiple applications
  - Identifies the service providers who will provide those services
  - Identifies the libraries that are part of the applicant and will receive services for each request
  - Calculates the discount rate and discount amount for the service

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## Form 471: Before You File

- Update all your entities
  - Normally done during “administrative window” prior to 471
  - Can still do via requests filed in EPC
- Put contract records into EPC
  - Upload *executed* contracts into EPC to reduce PIA questions

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## Form 471 Online Demo



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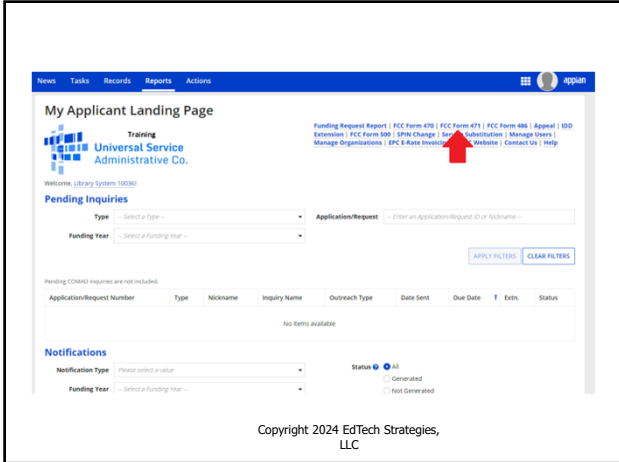
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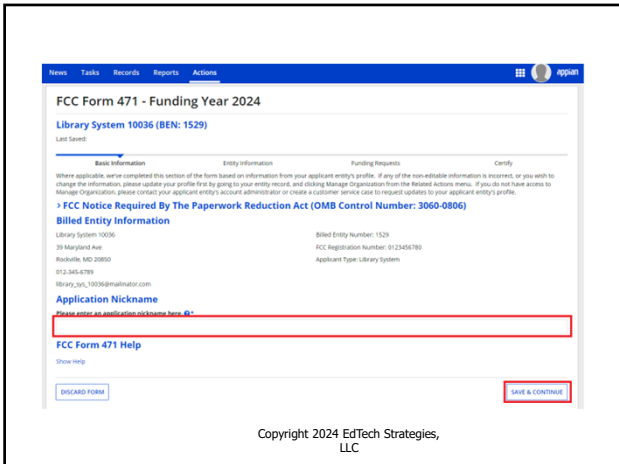
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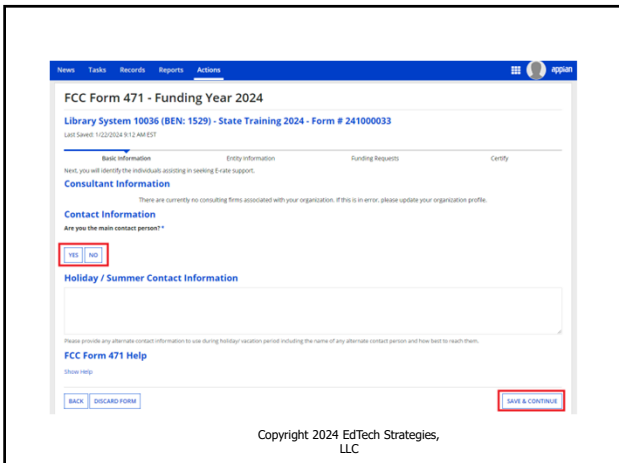
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**FCC Form 471 - Funding Year 2024**  
Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033  
Last Saved: 1/22/2024 9:15 AM EST

Basic Information    Entity Information    Funding Requests    Certify

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.

**Requested Discount Calculation**  
More than 50 percent of your library outlets/branches must be rural for the library system to be considered rural.

This discount rate has not been approved for the current year.

Associated School District Full-time Enrollment	Associated School District NLP Count	Associated School District NLP Percentage	Library System Urban/Rural Status	Category One Discount Rate	Category Two Discount Rate
207	128	62%	Urban	80%	80%

SHOW ADDITIONAL INFORMATION

FCC Form 471 Help

BACK    DISCARD FORM    SAVE & CONTINUE

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**FCC Form 471 - Funding Year 2024**  
Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033  
Last Saved: 1/22/2024 9:15 AM EST

Basic Information    Entity Information    Funding Requests    Certify

This page displays all of the funding requests for this application. From here you can create a new FRN, or edit, delete, or manage the line items of an existing one.

FRN Calculation

You haven't created any Funding Requests (FRNs) yet. Click the "ADD FRN" button to start creating your first FRN.

ADD FRN    EDIT FRN    REMOVE FRN    MANAGE FRN LINE ITEMS

FCC Form 471 Help

BACK    DISCARD FORM    SAVE & SHARE    REVIEW FCC FORM 471

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**FCC Form 471 - Funding Year 2024**  
Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033  
Last Saved: 1/22/2024 9:15 AM EST

Basic Information    Entity Information    Funding Requests    Certify

On this page, you will select a nickname and the service type of the product and services that you are requesting.

**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?  
YES    NO

Copy FRN  
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.

Service Type  
What is the service type of the product and services that you are requesting?  
Please select a value

FCC Form 471 Help

CANCEL    CONTINUE

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News Tasks Records Reports Actions

FCC Form 471 - Funding Year 2024

Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033

Last Saved: 1/22/2024 9:15 AM EST

Basic Information Entity Information **Funding Requests** Certify

Next, you will identify the purchasing agreement type for the product and services you are requesting.

**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

**FCC Form 471 Help**

Show Help

BACK CANCEL CONTINUE

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News Tasks Records Reports Actions

FCC Form 471 - Funding Year 2024

Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033

Last Saved: 1/22/2024 9:15 AM EST

Basic Information Entity Information **Funding Requests** Certify

Here, 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: 1529

Please note that BEN is a required field and you can use other search fields to narrow down your results.

Search by Contract ID

Search by Nickname (All or Partial)

Search by Contract No.

PICK ONE OF THE OPTIONS ABOVE, FILL IT OUT, THEN CLICK "SEARCH"

CLEAR FILTERS SEARCH

**FCC Form 471 Help**

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News Tasks Records Reports Actions

FCC Form 471 - Funding Year 2024

Library System 10036 (BEN: 1529) - State Training 2024 - Form # 241000033

Last Saved: 1/22/2024 9:15 AM EST

Basic Information Entity Information **Funding Requests** Certify

**Narrative**

Provide a brief explanation of the products and services that you are requesting, or provide any other relevant information regarding this Funding Request. You should also use this field to describe any updates to your entity data, such as revised student counts, entity relationships, etc. that you were unable to make after the close of the Administrative filing window for profile updates. These changes will be addressed during the application review process.\*

**FCC Form 471 Help**

Show Help

BACK CANCEL SAVE & VIEW FRN(S) SAVE & ADD/MANAGE FRN/LINE ITEMS

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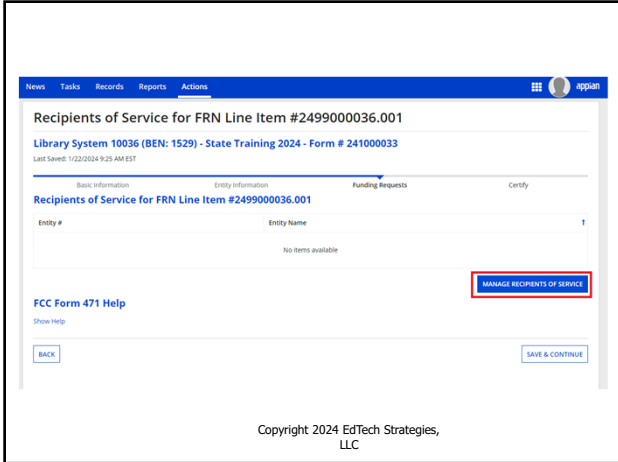
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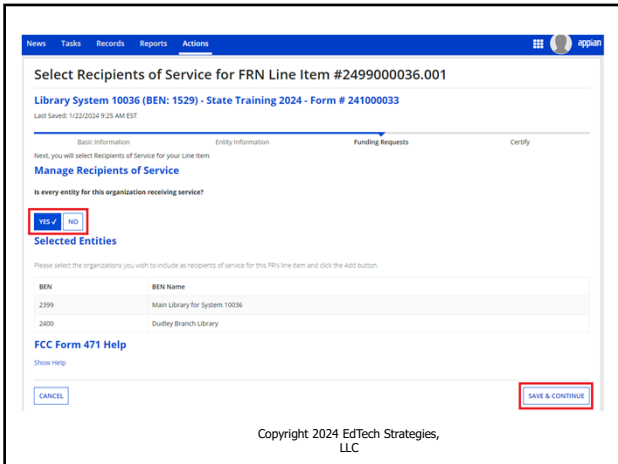
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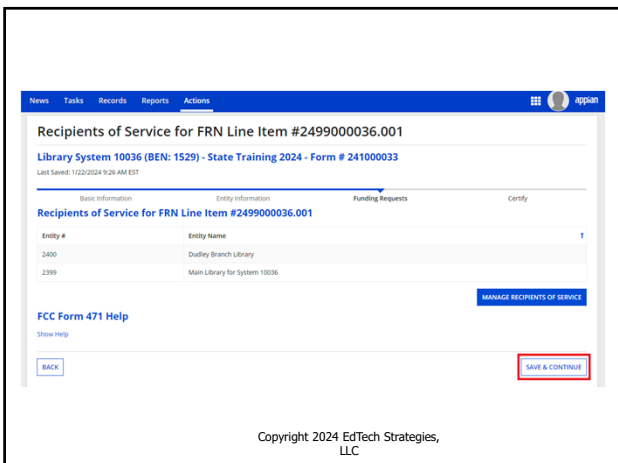
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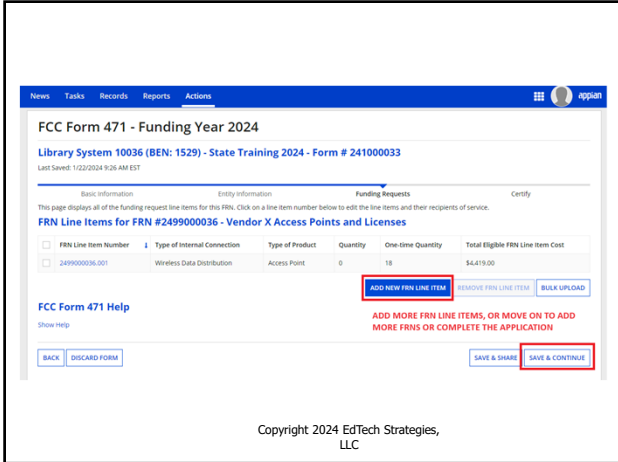
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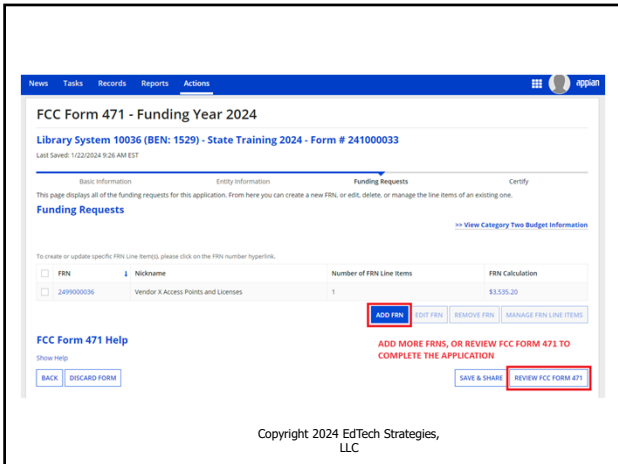
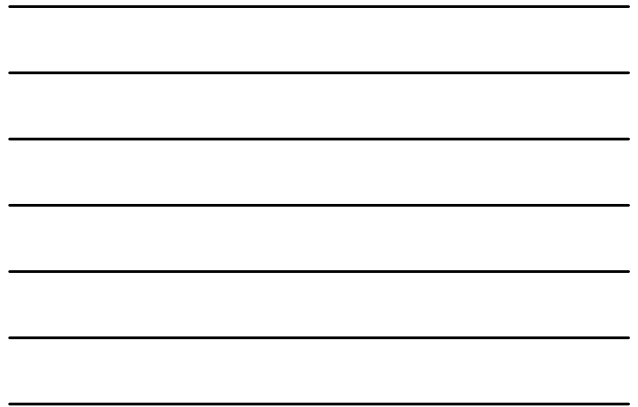
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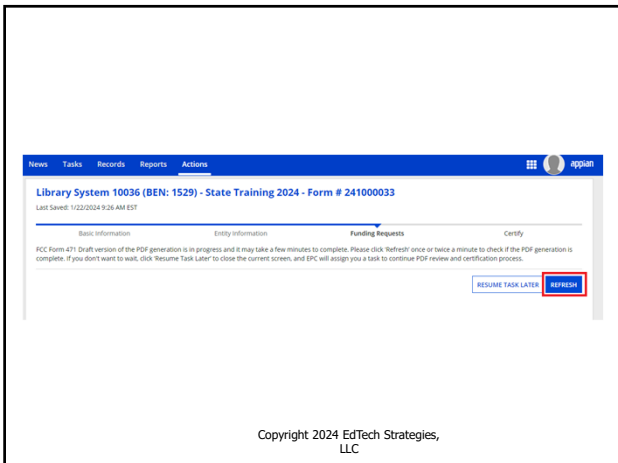
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# Final Thoughts

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# Final Thoughts

- Watch the e-rate@mbic.state.ma.us list and Newsbrief for updates and clarifications
- Sketch out your timelines to ensure you can meet the necessary deadlines (esp. for filing 471!)
- Next training in Spring 2024 to cover PIA review, Form 486, and invoicing
- Don't be afraid to ask questions!
  - Ask us on e-rate@mbic.state.ma.us – we love your questions!
  - CSB: 888-203-8100 or in EPC (under Actions "select", "Contact Us" to get answers from USAC)
- Make sure you stay in control of and monitor your applications
- Take advantage of E-rate if it can help you!

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# Questions?



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