PEPPM Mini-Bid Training
Funding Year 2026

For a copy of today's presentation, go to:
https://e-ratepa.org/?page_id=745

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On behalf of the Pennsylvania Department of Education
Fall 2025

Pressing Issues!

- Not receiving Lorrie's e-mails? – lgermann@e-ratepa.org
- EPC portal snafu's
- PDE enrollment/NSLP/CEP data coming soon
- Admin Window deadline not yet set
- ESL not yet adopted
- Form 471 window dates not yet

Hopefully we will receive this news by December 19.

What We're Covering

- What is PEPPM
- Why are Mini-Bids Required
- How to Conduct Mini-Bid
- Next Steps
- Timeline
- Q & A

What We're Not Covering

- What's eligible for C2
- Category 2 Budgets
- Form 470 Details
- Bid Evaluation
- Contract Records & Form 471 Completion

- Go to: https://e-ratepa.org/?page_id=745 if you want more info on these topics

- But you can ask questions about these topics and we will answer!

Why are Mini-Bids Required

- PEPPM is a State Master Contract, under MOU with PDE
- Considered a "Multi-Award Contract" because more than one manufacturer has a contract in each category
  - Thus, E-rate rules require applicants to allow all equivalent product lines in that category the chance to compete.
  - Applicants cannot simply select a product line and sign a contract without conducting a mini-bid.
- Schools do not post their own Form 470 when using PEPPM.
- Schools/libraries reference the PEPPM-issued Form 470 on their Form 471.

Eligible Services Notes - PEPPM Mini-Bids

- The FCC has proposed to cover "**remote** BMIC support" under Internal Connections starting in FY 2026. Result:

    - Full cost of multi-year remote support licenses will be able to be requested in the first year, no amortization required (just like right-to-use licenses)

    - Licenses will follow the purchase of the equipment and not be confined to a 7/1 – 6/30 timeline

    - Be sure to include remote support licenses on your PEPPM mini-bid, if needed

- PEPPM mini-bids not to be used for structured cabling, MIBS

- Include installation, configuration, basic training, if needed

PA Schools and Libraries Bidding Options

- Post a Form 470 (and RFP if required) in EPC

  Or

- Issue a PEPPM mini-bid using the structure we have established

  - Note: This option is only eligible if the school or library has signed the PEPPM LOA

  - Do not post a Form 470 if you are using this method

  - PEPPM posted a Form 470 when the PEPPM contract was issued and applicants will cite this Form 470 number when they create their Contract Record in EPC

Comparison: PEPPM vs 470/RFP

470/RFP Option

- Must post 470 (**& RFP** if over **$23,800 for public schools)**

- Must use for cabling projects, MIBS

- Can provide greater specificity about requirements

- Don't have to solicit bids from any vendor

- Public schools must advertise in 2 local newspapers once a week for 3 consecutive weeks

- <u>Must select "lowest responsible bidder". If all RFP criteria have been met and bid is considered qualified and responsive, must select lowest bid.</u>

PEPPM Option

- Don't have to post Form 470/Issue RFP
- Don't have to advertise in newspapers
- DO have to conduct a mini-bid of every vendor that sells equipment in that category

- Bidding period is 14 days (not 28)

- More appropriate for simple equipment, installation, remote support purchases

- Can consider non-cost factors as long as costs of E-Rate eligible equipment/services are the most heavily weighted factor

Important for PEPPM 2026

- If you intend to use the PEPPM mini-bid option for your FY 2026 Category 2 equipment purchases, **YOU CANNOT RELEASE A PEPPM MINI-BID TO VENDORS UNTIL AT LEAST JANUARY 2, 2026**. However, this is a great time to start creating your equipment lists so that you're ready to release the mini-bids come January 2nd

- PEPPM documents will be posted soon - http://E-Ratepa.org/?page_id=6121

- PEPPM awarded vendor list will be posted January 2
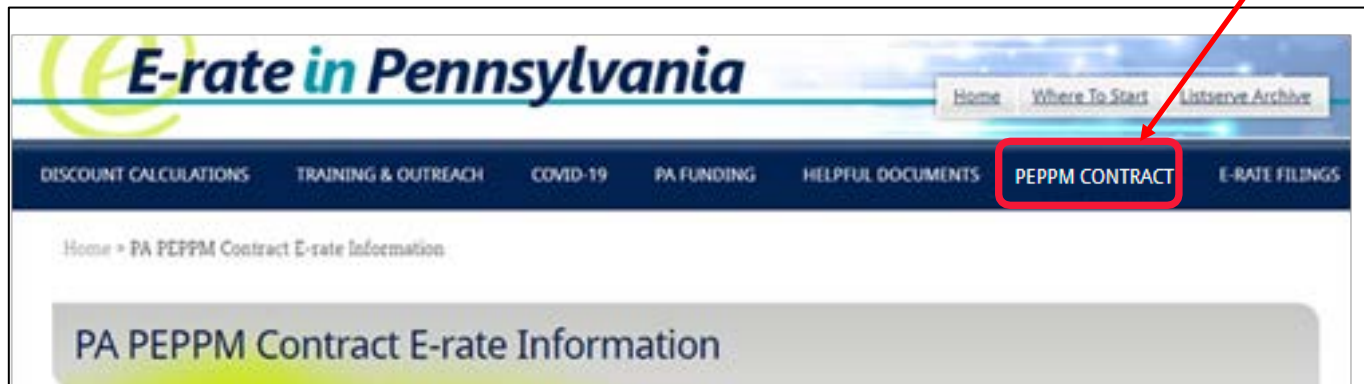
PEPPM Mini-Bid – How it Works

- Applicants use Equipment Bid List Template to create bid, citing model numbers, quantities, minimum equivalent bid specs or compatibility specs
    - Only one mini-bid per category is permitted.
    - Categories are wireless equipment, switches, routers, firewalls, UPSs, cabling/connectors, racks, and caching servers
    - May identify preferred manufacturer but must consider all equivalent bids submitted that meet minimum requirements
- Applicants use Cover E-mail Template to set bid deadline, where to e-mails bids and ask questions, disqualification factors, and any other directions to bidders
    - Must give vendors at least 14 calendar days to submit proposals
- Applicants use Attachment C Vendor Category List to filter manufacturers by category
- Then copy all Awarded Vendors' e-mail addresses into address line of Cover E-mail Template and send to vendors
- May also send to Authorized Resellers that you wish you bid

Where do you find all of these documents? >>>

PEPPM Page

https://e-ratepa.org/?page_id=6121

Read the Guide!

All documents you'll need are here:

PA State Master PEPPM Contract E-rate Information

For schools that choose to use the PA State Master PEPPM Contract as the procurement option for their E-rate Category 2 applications, a mini-bid process must be conducted among all manufacturers that can provide that "category" of equipment in order to meet the E-rate requirement that all equivalent product lines must be provided the opportunity to submit proposals. It's important that you first begin by reviewing the comprehensive, yet simple, step-by-step **PEPPM E-rate Bidding Guide 2025** 📄, and then use the attachments below to complete the process.

PEPPM E-rate Bidding Guide 2025 📄

Step 1: Create Equipment Bid List (**Attachment A** 📊)

Step 2: Create E-mail to All Awarded Vendors in Bidding Category (**Attachment B** 📧)

Step 3: Filter PEPPM Product/Category List for List of Awarded Vendors' Contact Info (**Attachment C** 📊)

   Note: _Always_ use the most recent PEPPM Product/Category List when issuing your mini-bid and download list for record retention!

Step 4: Conduct Bid Evaluation (**Attachment D**) 📊

Step 5: E-mail Winning Vendor (**Attachment E** 📧)

Step 6: Create EPC Contract Record (**Attachment F** 📧). See also **PEPPM Contract Record Guide**.

Equipment Bid List Template

1. Create equipment bid list (**Attachment A**)
   - ✓ Schools complete yellow areas
   - ✓ Vendors complete blue areas
   - ✓ The second tab shows the completed example
   - ✓ Save to your computer as an Excel file

District Name	E-rate Funding Year 2026								
BIDDER INFORMATION:	Company Name:								
	Company SPIN:								
	Contact Name:								
	Contact E-mail:								
	Contact Phone:								

To be completed by Vendor

To be completed by Vendor when submitting Equivalent Products

To Be Completed by School					To Be Completed by Vendor		Only required for vendors submitting equivalent product line quotes (different manufacturer than Column B)		
PEPPM Category (wireless, routers, switches, UPS, cabling, firewalls, etc.)	Preferred Manufacturer Name or Equivalent	Description (optional)	Model Number (SKU)	Estimated Quantity	Price/Unit	Extended Price (quantity * unit price)	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
Switch	Aruba or equivalent	HPE Aruba 2930M 48G POE+ 1-Slot - switch - 48 ports - managed - rack-mountabl	JL322A	96					
Switch	Aruba or equivalent	HPE Aruba X372 - power supply - hot-plug	JL087A#ABA	96					
Switch	Aruba or equivalent	HPE Aruba - network stacking module 2	JL325A	96					
Switch	Aruba or equivalent	HPE stacking cable - 1.6 ft	J9734A	96					
Switch	Aruba or equivalent	HPE Aruba - expansion module - 10 Gigabit SFP+ x 4	JL083A	33					
Switch	Aruba or equivalent	HPE Networking Instant On - SFP+ transceiver module - 10GbE	J9150D	58					
Switch	Aruba or equivalent	HPE Aruba - SFP (mini-GBIC) transceiver module - 1GbE	J4858D	13					
						$0.00			

Compatibility/Interoperability Requirements for Equivalent Bids

All switches should be managed layer 2 switches.
Switches should be able to stack more than 4 switches in a stacked configuration.
Must be compatible with existing Aruba switching equipment

Be sure to list compatibility, minimum tech specs!

Cover E-mail Template

2. Create a cover e-mail (**Attachment B**)
   - ✓ Modify cover e-mail as needed
   - ✓ Update yellow areas, at minimum (due date/contact e-mail/preferred manufacturer)
   - ✓ Copy and paste into cover e-mail

Sample PEPPM Mini-Bid Cover E-mail to Vendors

E-mail to: All Awarded Vendors from the PEPPM Category List Corresponding to Mini-Bid
BCC: Yourself

Dear Vendors:

The [Name of School or School District] will be applying for Category 2 E-rate funding for Funding Year 2022 using the PA PEPPM Contract. In accordance with E-rate rules that all equivalent product lines must be provided the opportunity to submit proposals, we are hereby conducting an E-rate Mini-Bid. Attached to this message is a list of the equipment and services (or their functional equivalent) for which we are seeking proposals. If your company does not provide direct responses to mini-bids, then we request that you either forward this procurement opportunity to your PEPPM authorized resellers, or notify us immediately so that we can send it to them directly.

Important note: Vendors must be an awarded PEPPM contract holder for the product line quoted in any bid submitted in response to this request.

This mini-bid specifically seeks proposals for [list name of category here, such as Switches or Wireless Equipment] and our preferred manufacturer product line is [XXXX or state that you do not have a preferred manufacturer].

Note to vendors seeking to propose equivalent equipment: We will evaluate bids that propose equivalent product lines, provided those products are equivalent in quality and functionality with the equipment in the attached mini-bid. Vendors proposing equivalent product lines **must** include in their proposal manufacturer proof such as manufacturer's specifications or other similar documentation that the equipment is equivalent in quality and functionality and follow the specific instructions listed below for completing the mini-bid response. Further, equivalent products must be fully interoperable and compatible with the District's existing equipment/systems and the documentation submitted must

PEPPM Category/Vendor List

3. Open the <mark>most current</mark> PEPPM Product/Category/Vendor spreadsheet (**Attachment C**)
   - ✓ Filter by which 'Category' your equipment falls under so that only Xs remain in the column
   - ✓ Then copy <u>all</u> of the e-mail addresses from Column P into an e-mail message
   - ✓ Attach a copy of the equipment bid list
   - ✓ Then send an e-mail with the equipment bid list to all awarded vendors in that category.   Don't combine categories on a single mini-bid solicitation.

Resellers?

	A	B	D	E	F	G	H	I	J	K	L	M	P	Q
	Manufacturer	PEPPM Awarded Vendor Name	Antenna, Connectors, Relate	Cabling	Caching	Firewa	Rack	Router	Switch	UPS	WA	Wireless Controllers	Awarded Vendor Contact Email	Uses Resellers (See next tab for list of Resellers)
	Alcatel-Lucent	ALE USA Inc	X					X	X		X	X	greg.kovich@al-enterprise.com	Yes
	Allied Telesis	TD SYNNEX Corporation	X			X		X	X		X	X	peppmerate@tdsynnex.com	Yes
	Arista Networks	Connection - Public Sector Solution	X					X	X		X	X	thomas.halberda@connection.com	No
	Black Box	CDW-G	X	X		X		X	X	X	X	X	amanda.maricque@cdwg.com	No
	CABLExpress	CXtec Inc.		X		X		X	X	X	X	X	alan.truex@cxtec.com	No
	Cambium Networks	App-Techs Corporation	X					X	X		X	X	jromanosky@app-techs.com	No
	Ciena	TD SYNNEX Corporation	X					X	X				peppmerate@tdsynnex.com	Yes
	Cisco	TD SYNNEX Corporation	X	X	X	X	X	X	X	X	X	X	peppmerate@tdsynnex.com	Yes
	Extreme Networks	Extreme...	X					X	X		X	X	PEPPMminibid@extremenetworks.com	Yes
	Fortinet	Fortinet, Inc.	X	X	X	X	X	X	X	X	X	X	ecrosby@fortinet.com / ljason@fortinet.com	Yes
	Grandstream Networks	PhoneAmerica Corporation	X					X	X			X	stevis@phoneam.com	No
	Hewlett Packard Enterprise (HPE)	TD SYNNEX Corporation	X	X	X	X	X	X	X	X	X	X	peppmerate@tdsynnex.com	Yes
	Juniper Networks	Juniper Networks (US), Inc.	X	X		X	X	X	X		X	X	gavinl@juniper.net	Yes
	NEC - Telecommunications	Guyette Communications Industries	X					X	X				tomh@guyettec.com	No
	Nutanix	Carahsoft			X	X			X				mason.smith@carahsoft.com	Yes
	Ruckus Wireless	RUCKUS Networks	X					X	X		X	X		

EXAMPLE – DO NOT USE

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Bidding Notes

- Vendors are not required to respond to mini-bids
- Vendors for your preferred manufacturer are expected to respond
- Must send to all Awarded Vendors in a category and MAY also send to resellers
  - Not required to send to all resellers
  - Awarded Vendors also may send to their resellers
- If you need to change your bid list, send new bid list to all vendors and extend timeline by 14 days
- You are not required to itemize equipment by school
- You are not required to purchase any equipment or service, just because it is listed on your mini-bid

Next Steps…

PEPPM Mini-Bid Next Steps

Conduct bid evaluation

- May consider other factors besides price
- Using the prices contained in the proposals submitted, schools will then create a bid evaluation to select the successful vendor
  - Price of eligible equipment/services **must** be the most heavily weighted factor, but you **may** consider other factors such as previous experience with the District, compatibility with existing equipment, references, cost to train or certify staff on new equipment, etc.
  - Be sure to ensure that minimum bid criteria have been met and disqualify any bids as required (DQ factors must have been listed in cover e-mail)
  - Note: be sure that bidder is either Awarded Vendor or Authorized Reseller for that manufacturer

PEPPM Mini-Bid Next Steps

- Applicant then contacts the winning vendor to obtain a draft contract document (or final quote with exact quantities) for the District to sign

- If required, seek school board approval
- Then review and sign contract (or vendor quote)
- Create E-rate Contract Record in EPC
  - Cite PEPPM Form 470 #
  - # of mini-bids received
  - Signing date of mini-bid contract
  - Contract expiration date: 9/30/2027
- Complete Form 471 by March deadline

Ordering & Receiving Equipment

- Permitted to purchase equipment April 1 or after
- Most FCDLs aren't issued until at least early May
- No reimbursements can be sought from USAC until July 1

Therefore…

- If you purchase equipment before July 1, and/or purchase prior to receiving FCDL, you will likely have to pay full price and then seek reimbursement from USAC (i.e. discounted billing method isn't an option)

Purchase Orders
- When ordering equipment, send PO to orders@peppm.org

After Equipment Received
- Be sure to label all equipment and enter into your asset inventory
- Equipment must be installed prior to 9/30/2027

Changing Equipment
- If you need different equipment than what was listed on your Form 471, be sure to submit a Service Substitution

PEPPM Mini-Bid Timeline

➢ Release PEPPM mini-bids to vendors in early January
➢ Bids due 14 days after
➢ Evaluate bids late January
➢ Seek board approval at late 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