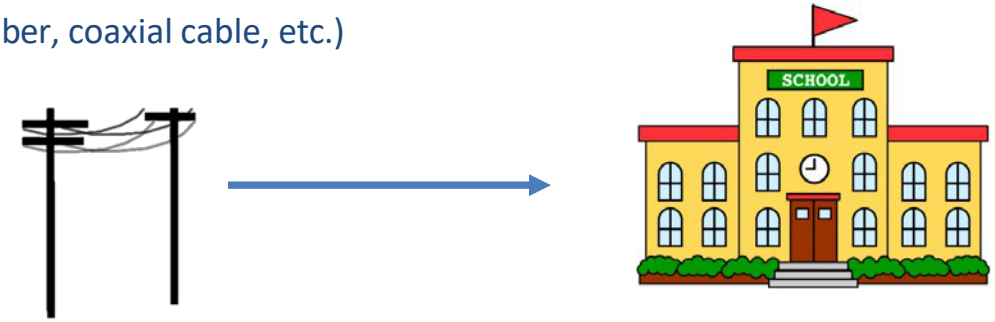
E-Rate Category 2 Eligibility and Form 470/Bidding Guide - Non-Public Schools and Libraries

Funding Year 2027

Presented by Lorrie Germann
On behalf of the Pennsylvania Department of Education
Fall 2026

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
- Firewall Appliances
- Racks and UPSs
  - That support eligible equipment only
- Right-to-Use licenses to support eligible equipment
  - **Includes license renewal subscription**
- **Remote support** (bug fixes, patches, software-based/online tech assistance, configuration changes)
- Cloud-based functionality of eligible equipment
- Installation and configuration
  - If wanted, be sure to specify this in your 470/RFP
- Taxes and fees
- Basic training on use of equipment

- Not eligible:
  - **Cybersecurity!!!!!!**
  - Storage Devices
  - Voice/Video Components
  - End User Devices
  - Security cameras
  - Advanced firewall functions, like anti-spam, anti-virus, etc.
  - Staff salaries

Library Small C2 Bidding Exemption

- Libraries are exempt from bidding on Category 2 equipment or services if:
  - Total pre-discount amount is $3,600 or less
  - Total cost is per library and cannot be averaged over multiple libraries
  - Cost-effective rules still apply
  - Contracts still must be signed prior to filing the Form 471

Category 2 Cost Allocations

Depending on the functionality of some equipment or software, the product may not be fully eligible for E-Rate funding, requiring a percentage of the cost to be deducted.

- Below are links to manufacturers' websites or documents they have provided, publishing their cost allocations.
  - Cisco/Meraki
  - Fortinet
  - HP Aruba
  - Juniper Networks
  - Palo Alto Networks (click on download PDF)
  - Sophos
  - **Or call USAC at 888-203-8100, who should be able to tell you if the SKU is fully eligible**

Search Results

SKU	Description	Eligible	Notes
C9410R-96U-BNDL-E	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-E LIC	100%	
C9410R-96U-BNDL-A	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-A LIC	Cost Allocate (79%)	

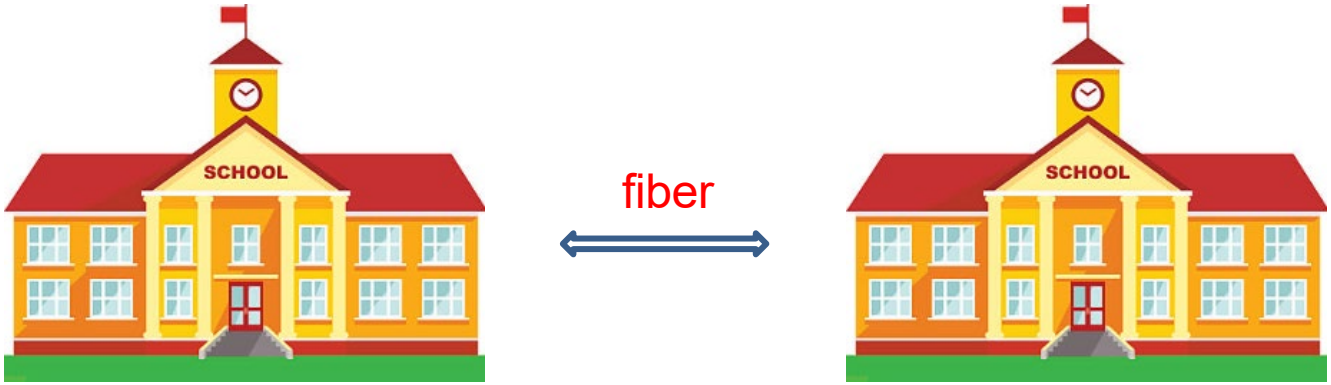
Internal Connections Purchase Timeline

- Equipment can be purchased <u>as early as</u> April 1, prior to funding year start
  - For example, applicants can purchase equipment on April 1, 2027 for FY 2027, even though the funding year doesn't begin until July 1, 2027
  - However… 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 <u>as late as</u> September 30, following the end of funding year
- Allows applicants two full summers to install equipment

FY2027 - Non-Recurring Services/Equipment Purchases - April 1, 2027 - Sept 30, 2028																	
			FY2027 - Recurring Service - July 1, 2027 - June 30, 2028														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2027	2027	2027	2027	2027	2027	2027	2027	2027	2028	2028	2028	2028	2028	2028	2028	2028	2028

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
    - Considered "Self-Provisioned Fiber" and must bid accordingly on Form 470
    - Cannot use C2 funding, unfortunately



Basic Maintenance (BMIC) Definition

- Basic Maintenance of Internal Connections is the **on-site repair and upkeep of eligible internal connections (time & materials)**.
- The equipment being maintained must be eligible in order for the maintenance to be eligible for E-Rate support.
  - If repair or replacement work is performed under a maintenance contract, USAC only reimburses for the **actual work performed**.
  - You must keep a maintenance log documenting work performed.
- Can only be for services/work performed during the 12-month funding year (7/1/2027 – 6/30/2028)
  - Does <u>not</u> follow the 4/1/2027 – 9/30/2028 schedule

BMIC Services Exclusions

- Actual equipment being maintained (e.g., cabling, access points, switches)
  - These are eligible under **Internal Connections.**
- Unbundled warranties (Not Eligible for E-Rate Funding)
- Network management services, including 24-hour network monitoring (Eligible under **Managed Internal Broadband Services** (MIBS))
- The management, operation, and monitoring of eligible broadband internal connections (Eligible under **Managed Internal Broadband Services** (MIBS))
- Maintenance on ineligible equipment (Not Eligible for E-Rate Funding)

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
- 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 the date of purchase, must record the reason and date of transfer and update asset inventory
    - **No notice to USAC is required**
  - Asset inventory must be retained for 10 years from the 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 C2 Eligibility

- Non-instructional facilities (NIFs) are not eligible for C2 funding/equipment that is specific to their building
- However, shared equipment may be housed at a NIF
  - For example:
    - A Wireless Controller may be housed within a NIF
    - Wireless Access Points in a NIF may not be purchased with E-Rate funds

After 5 years, you can transfer the equipment to the NIF

Category 2 Budget Calculations

5-Year Category Two (C2) Budget Cycle

FY 2026 started the first year of the 5-year FY 2026-2030 funding cycle.

- The E-Rate C2 Budget Tool FY2021+ provides data on the FY 2026-2030 C2 budget cycle.
- Applicants are required to validate their student counts or library square footage in the first year they apply for C2 support during the FY2026-2030 cycle.
- The C2 budget is calculated at the **school district** and **library system** level based on the combined enrollment (schools)/square footage (libraries).
- **To qualify for Category 2 funding, you must be CIPA-compliant**
- Update your entity profile in EPC during the Administrative Window
- **Confirmed Budget:** Once Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year.

FY2026-2030 C2 Budget Cycle Updates

Schools:

- **$201.57/student**
- **$30,175.00 funding floor**
  - This means a school with fewer than 150 students ($201.57/student * 149 students = $30,033.93) receives the funding floor of $30,175.

Libraries:

- **$5.43/square foot**
- **$30,175.00 funding floor**
  - This means a library with fewer than 5,558 square feet ($ 5.43/square foot * 5,558 square feet = $30,174.51) receives the funding floor of $30,175.

Calculating Your Budget – OPTIONS

The Category 2 Order provides an exception for small school districts and library systems.

Specifically, it allows school districts and library systems with 10 or fewer sites the option to calculate their budgets on a per-site basis by **adding together** the budgets of each eligible site within the district.

School	Student Count	Budget Calculation ($201.57/student	Budget Received (Use minimum budget if calculation is less)
ABC High School	567	$114,290.19	$114,290.19
ABC Middle School	532	$107,235.24	$107,235.24
ABC Elementary School	212	$42,732.84	$42,732.84
West Elementary School	125	$25,196.25	$30,175.00
East Elementary School	131	$26,405.67	$30,175.00
Totals	**1567**	**$315,860.19**	**$324,608.27**

Based on enrollment count

Based on the budget floor

Establishing Your C2 Budget for this Cycle

- Update your entity profile in EPC during the Administrative Window
- **Forecast Budget**: Beginning in the FY2026- 2030 budget cycle, all entities will have a Forecast budget status based on the information in their EPC profile. This means that any updates you make to the entity profile will automatically reflect in an updated budget amount, without the need to request a replacement budget.
- **Preliminary Budget:** The entity has **certified** a Form 471 application within the FY2026-2030 C2 budget cycle. This means that the entity has certified the accuracy of the budget data currently in the entity profile.
- **Confirmed Budget:** Once Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year.

Category 2 Pre-Discount Budget Example

5-Year C2 Budget Cap*	E-Rate Discount	E-Rate Will Pay:	District's Share %	District Must Pay:
$204,475	60%	$122,685	40%	$81,790

* The C2 Budget Cap is the pre-discount price. E-Rate discounts will then apply on top of the budget cap. In this example, the applicant would still owe its 40% non-discounted share

Data Used for Category 2 Budgets

- Enrollment data is entered in a separate location in EPC (different from discount calculations)
- Why? Enrollments are set at the first year you apply for C2 during that Category 2 Budget Cycle
- Not required to update annually
- CAN update if it will increase your C2 budget
  - Must then ask for C2 Budget Recalculation from USAC

For Libraries, you will enter/update square footage per library site

Where to update C2 enrollment data?

>>> EPC Landing Page > School or Library Name > Manage Organization > Scroll to bottom of page

CATEGORY 2 BIDDING REQUIREMENTS FOR PA NON-PUBLIC SCHOOLS & LIBRARIES

C2 Bidding Requirements (applies to all applicants)

- ✓ Equipment list MUST allow for equivalent manufacturer's products to be bid
  - "Cisco 48-port PoE Switch or equipment that is equivalent in functionality and quality"
  - May include a requirement that equivalent equipment must be fully interoperable and compatible with District's existing "XYZ" equipment
    - Be sure to list your existing equipment

- ✓ Binary bid disqualification reasons be stated in the State and Local Procurement Requirements of the Form 470 or in the RFP
  - DQ reasons must be yes/no (either they complied or they did not)

- ✓ Absent a bid due date, applicants are now required to consider all bids received up until the date you conduct your bid evaluation. Therefore, I suggest including the following language:

  "Deadline for vendor proposals is [*January 8, 2027*] at 9:00 am Eastern. We reserve the right to reject late-submitted proposals. Proposals must be emailed to the Form 470 contact unless otherwise noted."

C2 Bidding Requirements (applies to all applicants)

- ✓ Companies deemed national security risks are not eligible for E-Rate funding
  - FCC prohibits the use of Universal Service funding, including E-Rate funds, to purchase equipment and services from companies deemed a national security risk. Be certain that you do not consider any proposals that include any of the companies listed here: https://www.fcc.gov/supplychain/coveredlist

- ✓ All RFP amendments/Q & A/additional information given to bidders besides what is in the original Form 470 or RFP must be uploaded into EPC with the original Form 470
  - Includes relevant information given to vendors that would impact bid (FAQs)
    - Locate 470 in EPC > Related Actions > Add an RFP Document
    - Restart 28-day clock for service or entity changes
  - Restarts the 28-day clock if a "substantial change" is made to RFP (adding equip/ services, modifying project scope)

- ✓ Vendors cannot provide RFP language

- ✓ All C2 services/equipment must have a signed contract before Form 471 is filed

Abide by the Gift Rules

- Receipt or solicitation of gifts by applicants from service providers (and vice versa) is a competitive bidding violation
- Service providers may not offer or provide any gifts or things of value to applicant personnel involved in E-Rate
- Gift prohibitions are always applicable – not just during the competitive bidding process
- Exceptions for gifts – limited to items worth $20 or less, including meals or prizes, and cannot exceed $50 from one service provider to each individual per funding year
- Watch our Gift Rules video for more details on the gift rules

Category 2 Form 470

- If you have additional information than what is listed in your RFP (in RFP or other document), that document must be uploaded when 470 is posted
- All addenda and additional information provided to vendors also must be uploaded into EPC at the time of issuance – Locate 470 in EPC > Related Actions > Add an RFP Document – Restart 28-day clock for service or entity changes
- It's ok to forward your posted 470 to potential vendors to encourage bidding

***Best Practice Timeline**: Post 470/File RFP by the first week of December, conduct your bid evaluation in January, and file the Form 471 in February or early March.*

CATEGORY 2 BIDDING OPTIONS FOR PA SCHOOLS & LIBRARIES

PA schools and libraries have two options to competitively bid E-Rate eligible equipment:

1) **Post Form 470 in EPC**

~ or ~

2) **Conduct Mini-Bid Using PA PEPPM Contract (if a non-public school or library submitted a PEPPM LOA)**

Comparison: PEPPM vs 470/RFP

470/RFP – Option 1

- Must post 470 and wait a minimum of 28 days
- If changes are made, restarts the 28-day waiting period
- Can provide greater specificity about requirements
- Must respond to all vendors who have questions regarding equipment requested

PEPPM – Option 2

- **Don't** have to post Form 470
- **DO** have to conduct a mini-bid of every vendor that sells equipment in that category
- **Don't** have to wait the full 28 days during mini-bid process
- Pool of vendors who can participate already selected

Using PEPPM for C2 Procurement

- If your school or library signed the PEPPM LOA, they may use the state PEPPM contract for Category 2 purchases
- No Form 470 is required, but PEPPM mini-bid process is required
  - All vendors in a certain 'category' must receive mini-bid equipment list
  - Proposals must be accepted for 14 days
  - Factors besides price may be considered
- NOTE FOR FY2027: A supplemental Form 470 was submitted to add several additional product lines. **If you prefer one of these manufacturers, RELEASE A PEPPM MINI-BID TO VENDORS after JANUARY 2, 2027**.

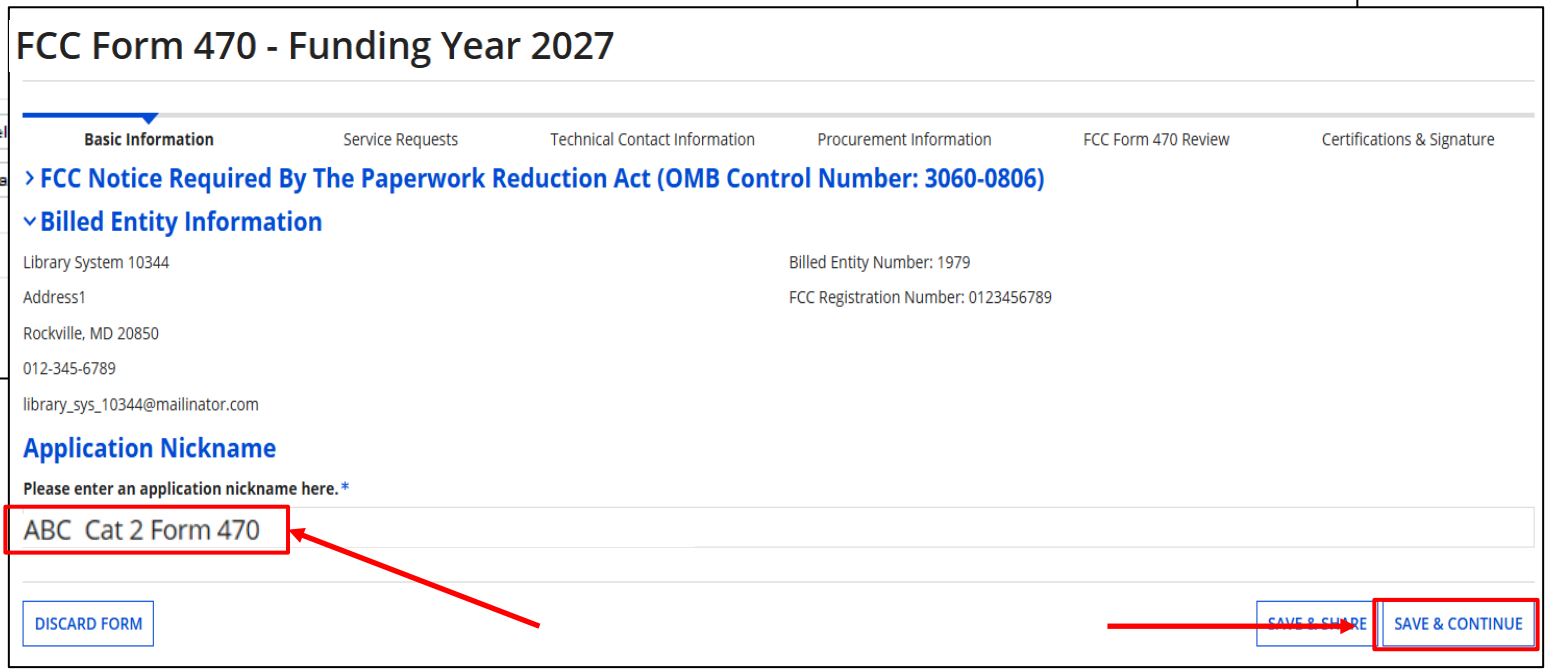
PEPPM 2027 Product Lines eligible for discounts under the federal E-rate Program										
Product Line	Antenna, Connectors, Related Component	Cabling	Caching	Firewall	Racks	Routers	Switches	UPS	WAPs	Wireless Controllers
Arista Networks	X					X			X	X
Belden	X	X								
Cables2Go	X	X			X					
Lowell Manufacturing Company					X			X		
ReadyLinks							X		X	
Riverbed						X	X			
Samsung - Networking/Voice	X			X			X			X
SolarWinds				X						
Tripp Lite	X	X			X			X		
Ubiquiti	X	X				X	X		X	X
Vivi										X

- **PEPPM bidding guide can be found at https://e-ratepa.org/?page_id=6121**

Bidding Option #1:
Post Form 470 with RFP

Starting the Form 470

From the Landing Page, click on “FCC Form 470”.



Enter Nickname (user defined) and click on “Save and Continue”

Completing the Form 470

News | Tasks (4) | Records | Reports | Actions | Appian

FCC Form 470 - Funding Year 2027

ABC Cat 2 Form 470 - Form #270001790

Last Saved: 10/9/2026 5:19 PM EDT

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

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: Library System

Number of Eligible Entities: 7

Recipient(s) of Service
- Public Library
- Main Branch
- Public Library System

Recipients of Service

Billed Entity Name	Billed Entity Number
Ohio County Library	10426

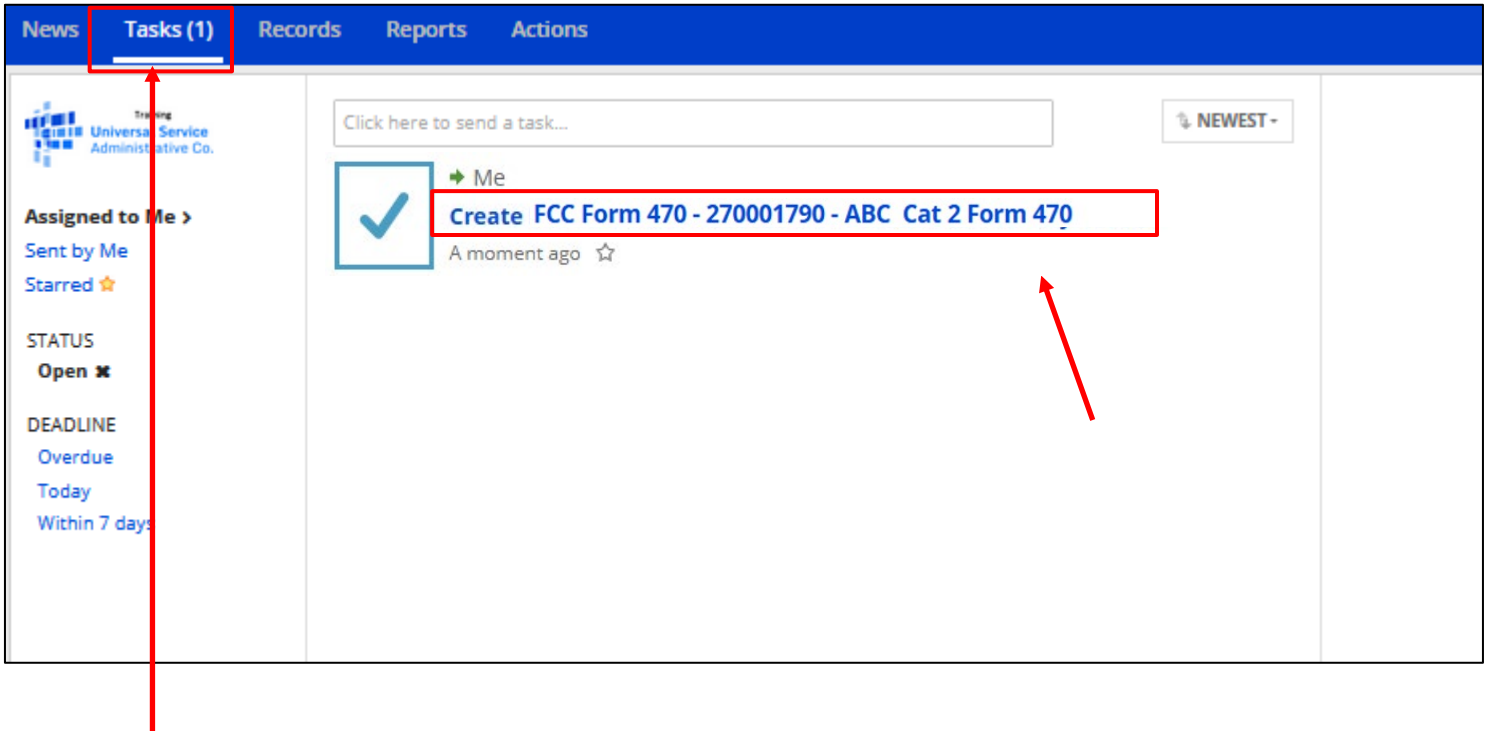
BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

Once you save the application, the “Task” is indicated on the main menu bar

Verify the information listed about your entity. If necessary, update your profile

Click on “Save & Continue”

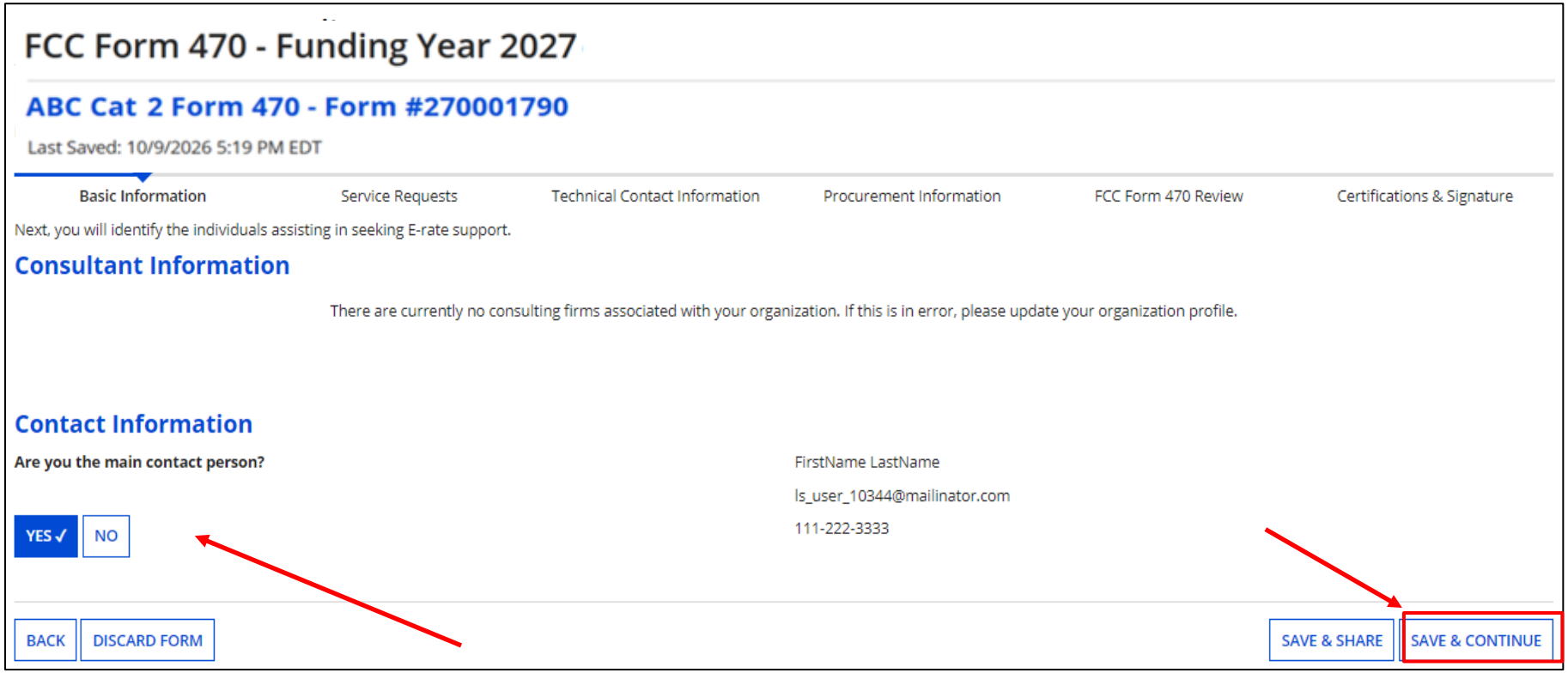
Tasks



If you start an application, and cannot complete it, go to "Tasks" located on the main menu bar, and click on form to complete

Note: It will say "Create" instead of "Continue"

Contact Information



Choose option for contact information. If “Yes”, your info will display

If someone else will be the main contact, choose “No” and provide their information. Keep in mind, they must have a portal account

Click on “Save & Continue”

Choosing Category of Service

FCC Form 470 - Funding Year 2027

ABC Cat 2 Form 470 - Form #270001790

Last Saved: 10/9/2026 5:19 PM EDT

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

BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

Choose “Category 2”

Click on “Save & Continue”

Adding An RFP

FCC Form 470 - Funding Year 2027

ABC Cat 2 Form 470 - Form #270001790

Last Saved: 10/9/2026 5:19 PM EDT

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.

Cat 2 RFP
DOCX – 37.7 KB

UPLOAD *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.

BACK DISCARD FORM SAVE & SHARE SAVE & CONTINUE

If you have an RFP for any of the services that will be included on the Form 470, click on "Yes". This could be a spreadsheet with a list of hardware and quantities

If requesting MIBS for existing connectivity equipment (routers, switches, APs, firewalls, etc.), provide make/model and quantities of each

You will then see the "Upload" option to attach the RFP file

You can add multiple documents, if necessary, for both Category 1 & 2

Click on "Save & Continue"

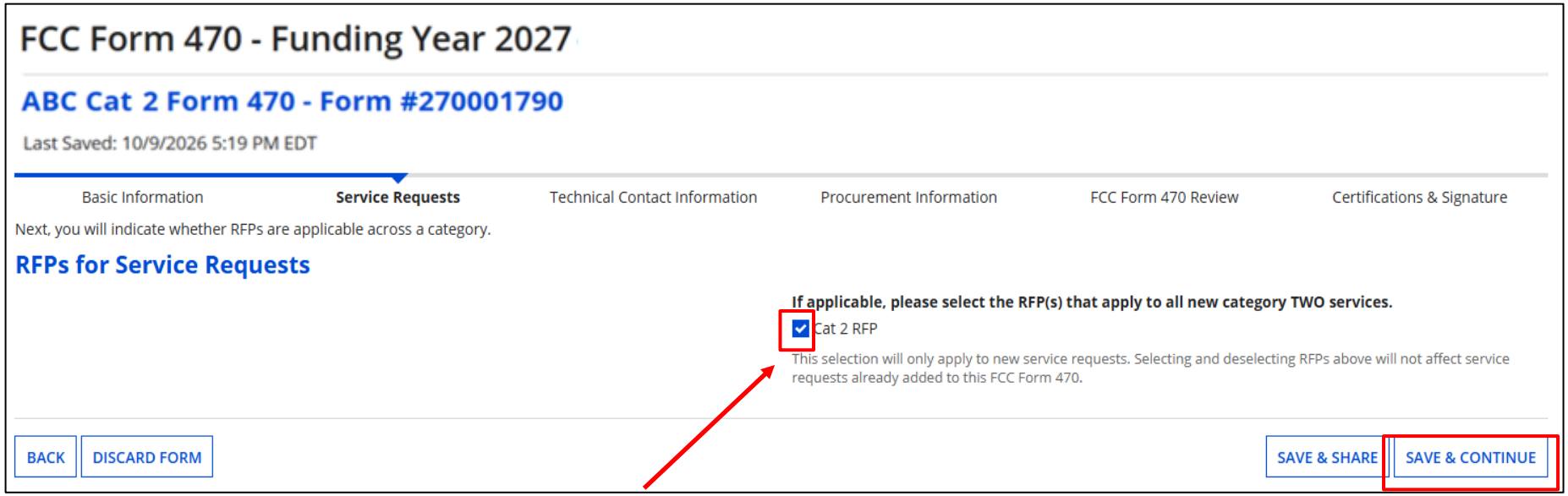
Simple RFP Examples

Cat 2:

Item Description	Quantity	Unit Price	Total
Cisco Meraki MR42 Cloud Managed or Equivalent	207		
Cisco Meraki Enterprise Cloud Controller or Equivalent - Subscription license (5 years)	207		
Cisco Catalyst 3850-12XS-S or Equivalent	1		
Cisco Catalyst 3850-48F-S or Equivalent	6		
Cisco Catalyst 3850-24P-S or Equivalent	1		
Cisco Catalyst 2960X-48FPD-L or Equivalent	19		
Cisco Catalyst 2960X-24PD-L or Equivalent	1		
Cisco FlexStack-Plus Network stacking module or Equivalent	19		

Don't forget to add the "or equivalent"!

Choose RFP



If applicable, select the RFPs that apply to all new Category 2 services

If you answered “No” previously to RFP’s, this screen would not display ☺

Click on “Save & Continue”

Requesting Category 2 Services

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

Next, you will describe the services you are requesting.

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.

BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

Click on “Add New Service Request” to start

Note: while E-Rate will only fund Category 2 requests for schools or library branches, you may include items on the 470 for bidding purposes that will go into a NIF

Requesting Category 2 Services

Next, you will describe the services you are requesting.

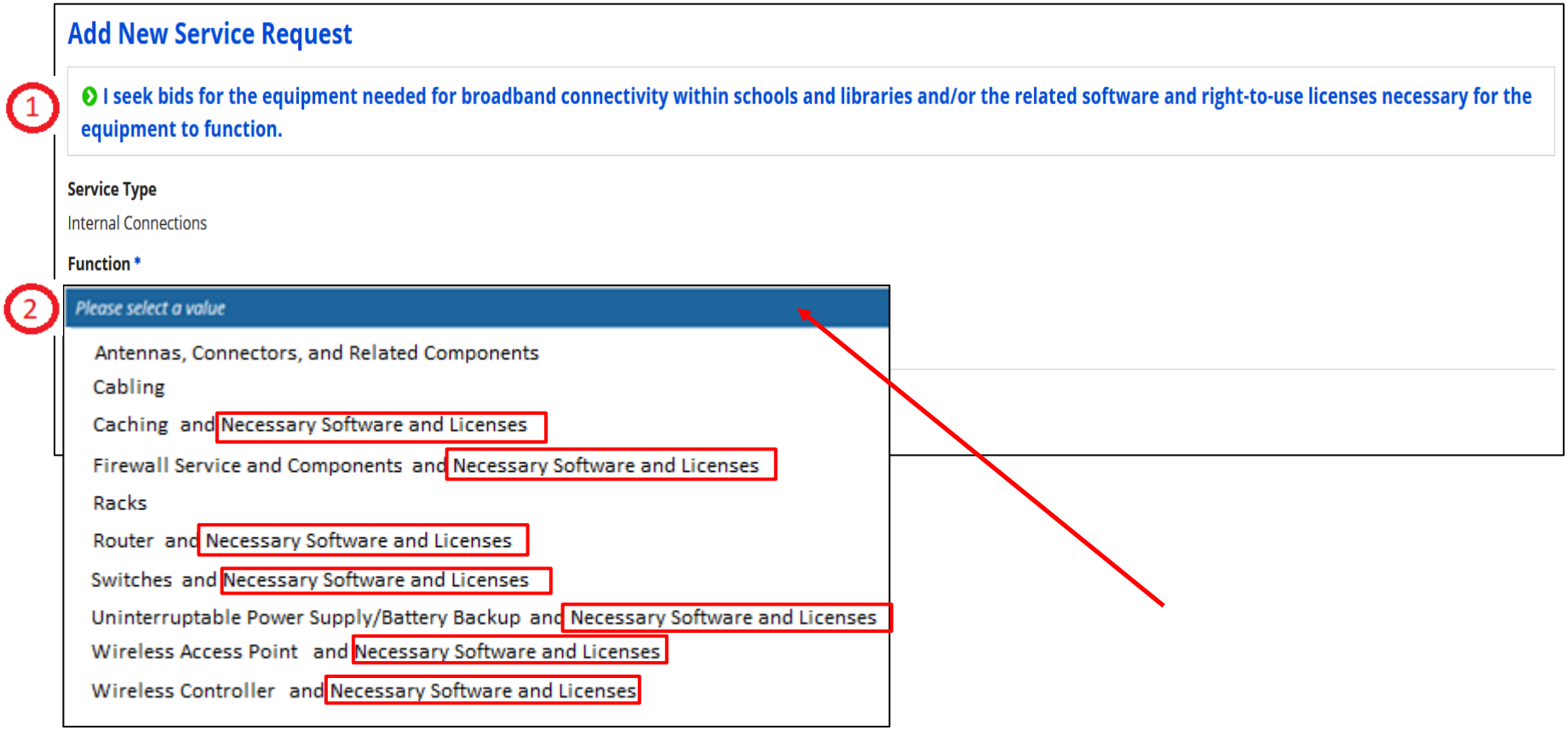
Add New Service Request

1. 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.
2. 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.
3. I seek bids for the operation, management, and monitoring of eligible broadband internal connections.

CANCEL

1. Select this option if seeking Internal Connections equipment. This includes licenses and remote support subscriptions.
2. Select this option if seeking basic maintenance service (on-site/ time and materials) of eligible equipment.
3. Select this option if seeking Managed Internal Broadband Service (MIBS)

Requesting Internal Connections



Select the first option to choose Internal Connections, and then click on the "Function" pull-down to choose a value

"Software and Licenses" language is listed where applicable for hardware. **This will also include remote type support**

Requesting Internal Connections

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 *
Wireless Access Points and Necessary Software and Licenses

Quantity *
100

Unit
Each

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

Manufacturer
Meraki or equivalent

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.
☐ Library Bandwidth Needs RFP
☑ Library Hardware Needs RFP.docx

Service Type
Basic Maintenance of Internal Connections

Function *
Wireless Access Points

Quantity *
100

Unit
Each

Manufacturer
Meraki

Number of entities served?

Please select the RFP(s) that apply to this service request.
☐ Library Bandwidth Needs RFP
☑ Library Hardware Needs RFP.docx

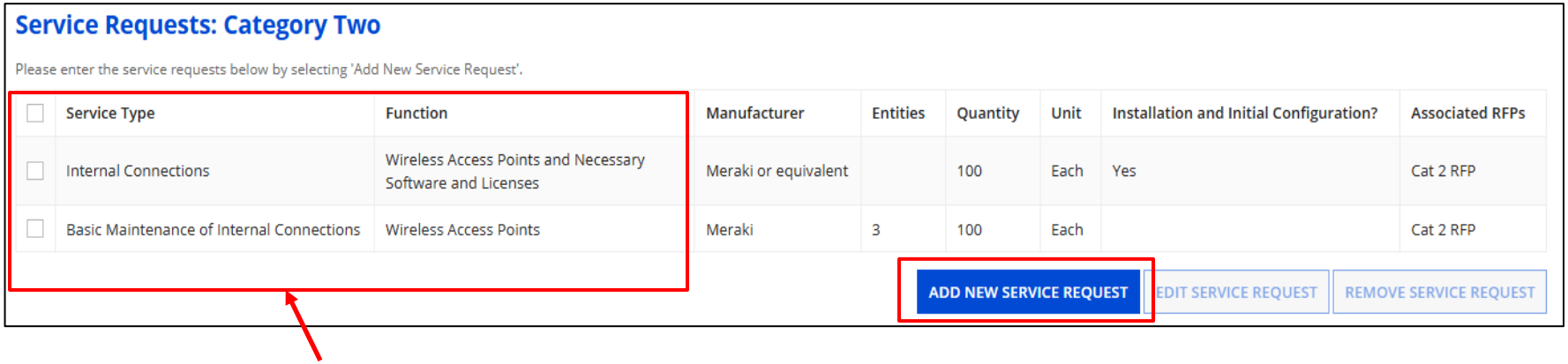
CANCEL | SAVE & CREATE ANOTHER REQUEST | SAVE REQUEST

Check the box if you are also seeking **on-site (time-and-material) type maintenance** for the **new equipment,** and the request will be added. Enter the number of entities served.

After selecting "Function", enter quantity, select preferred Manufacturer, and select "Yes" if you are seeking Installation, Activation, and Configuration

If also seeking **on-site Basic Maintenance** for the hardware chosen, check the box and enter the number of entities it will serve. The "Function", "Quantity", and "Manufacturer" are provided for you. Click on "**Save Request**"

Adding Category 2 Services



Service Requests: Category Two

Please enter the service requests below by selecting 'Add New Service Request'.

	Service Type	Function	Manufacturer	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
☐	Internal Connections	Wireless Access Points and Necessary Software and Licenses	Meraki or equivalent		100	Each	Yes	Cat 2 RFP
☐	Basic Maintenance of Internal Connections	Wireless Access Points	Meraki	3	100	Each		Cat 2 RFP

ADD NEW SERVICE REQUEST | EDIT SERVICE REQUEST | REMOVE SERVICE REQUEST

Note: The Access Points are now listed under both IC and BMIC

Click “Add New Service Request” to continue adding additional services

Remember, if it’s not on the 470, you cannot get it funded on the 471

You can also choose to “Edit” or “Remove” requests if needed by checking the box to the left of the item and then click “Edit Service Request” or “Remove Service Request”

Adding Category 2 Renewal License

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 *
Wireless Access Points and Necessary Software and Licenses

Quantity *
100

Unit
Each

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

Manufacturer
Other

Manufacturer Description *
We are seeking license for our existing 100 Meraki MR-42 APs

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

CANCEL | SAVE & CREATE ANOTHER REQUEST | SAVE REQUEST

If you already own the hardware but need to renew licenses, you may add them by choosing the "Function" or type of hardware the license is for. Under "Manufacturer," choose "Other" and describe. **If requesting a license for existing hardware, it's o.k. to state the model. Also, check the box to request the renewal under BMIC, in case some level of on-site maintenance is included.**

Explain in the narrative that you are seeking the license under both IC and BMIC because it's unclear which Service Type they may fall under.

Enter "Quantity" and if you are seeking Installation. Click on "Add."

Adding On-Site Basic Maintenance for Existing Hardware

Add New Service Request

1

- ○ 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.

Select Basic Maintenance

CANCEL

Add New Service Request

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.

If you select the wrong option, click anywhere on the blue text to go back.

Service Type

Basic Maintenance of Internal Connections

Function *

Please select a value

2

Please select a value

- Antennas, Connectors, and Related Components
- Cabling
- Caching
- Firewall Service and Components
- Racks
- Router
- Switches
- Uninterruptable Power Supply/Battery Backup
- Wireless Access Point
- Wireless Controller

Click on the pull-down to select the type of equipment to maintain. Notice, there's no language about licenses.

Here, you are only requesting maintenance, not the actual purchasing of the equipment

Adding Basic Maintenance for Existing Hardware

Add New Service Request

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.

Service Type

Basic Maintenance of Internal Connections

Function *

Routers

Quantity *

10

Unit

Each

Manufacturer

Cisco Systems

Number of entities served?

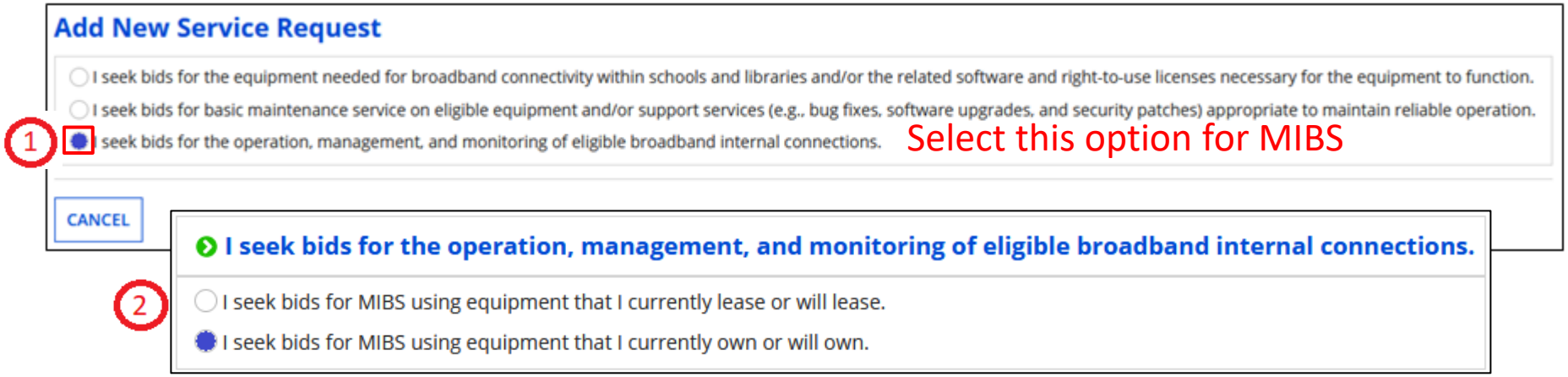
4

CANCEL | SAVE & CREATE ANOTHER REQUEST | SAVE REQUEST

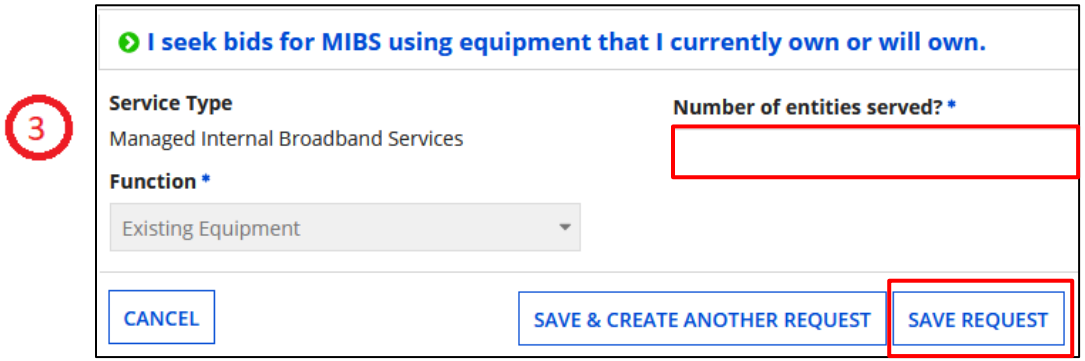
Select the manufacturer of hardware to be maintained, the quantity, and how many entities will be served

Click on “Save Request”

Adding Managed Internal Broadband Service (MIBS)



Select whether you're requesting MIBS that includes lease equipment or for equipment currently or will be owned.



For either option, enter the number of entities served

NOTE: If requesting MIBS for existing equipment, be sure to provide a list of the equipment's make/model and quantities. Click on "Save Request"

Adding Category 2 Services

Service Requests: Category Two

Please enter the service requests below by selecting 'Add New Service Request'

	Service Type	Function	Manufacturer	Manufacturer Other Description	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
☐	Internal Connections	Wireless Access Points and Necessary Software and Licenses	Meraki or equivalent			100	Each	Yes	Hardware Upgrade RFP
☐	Basic Maintenance of Internal Connections	Wireless Access Points	Meraki		4	100	Each		Hardware Upgrade RFP
☐	Internal Connections	Switches and Necessary Software and Licenses	Cisco Systems or equivalent			10	Each	Yes	Hardware Upgrade RFP
☐	Basic Maintenance of Internal Connections	Wireless Access Points	Other	We are seeking licenses for existing Meraki MR-42 APs	4	100	Each		Hardware Upgrade RFP
☐	Managed Internal Broadband Services	Existing Equipment			4				List of Hardware to be maintained
☐	Internal Connections	Cabling	No Preference		4	10000	Feet	Yes	Hardware Upgrade RFP

6 items

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.

We are seeking access points and network drops for each device. See the attached RFP document for a list of sites/addresses, floor plans of each building , and all bidding requirements.
If bidding on the cabling project, a site walk-through is required in order for your bid to be considered. Scheduled dates for walk-throughs can be found in the RFP.
The applicant reserves the right to reject bids that are received on or after the Allowable Contract Date shown on the Form 470.
All equipment shall be new and shall include manufacturer warranty (three year). If equipment is different from what is requested, documentation must be provided with the proposal demonstrating that the proposed equipment is equivalent or the proposal will not be considered.

BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

Make sure all items/services are listed and verify they are under the correct “Service Type”. “Edit” or “Remove” requests if needed by clicking the box to the left of the item.

Add a narrative to provide detail. Click on “Save & Continue”

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.

BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

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

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 ✓

First Name *

Last Name *

Title

Phone Number *

Phone Number Extension

Email *

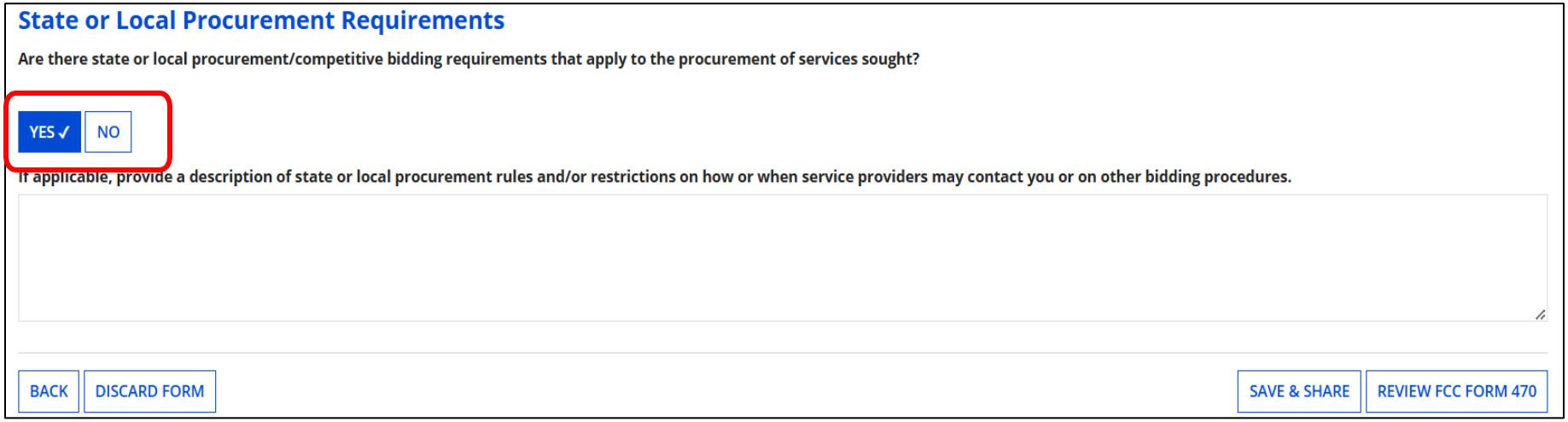
Re-enter Email *

BACK | DISCARD FORM | SAVE & SHARE | SAVE & CONTINUE

- 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

- **NEVER ADD A CONTACT AFFILIATED WITH A SERVICE PROVIDER!!**

State or Local Procurement Rules?



- 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 the last 2 years
  - Vendors must attend a pre-bid meeting or conduct a mandatory walk-through 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

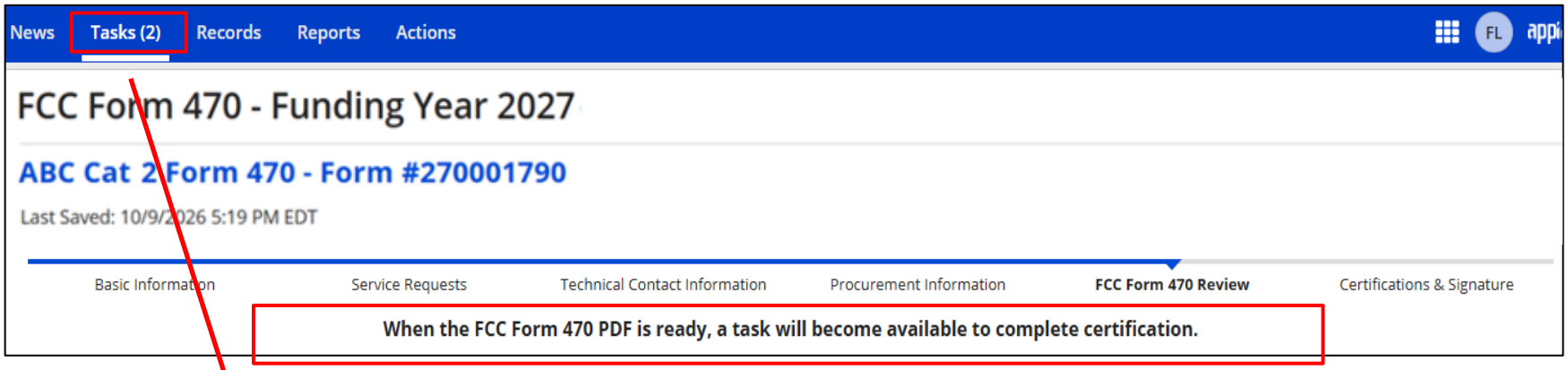
If applicable, provide a description of state or local procurement rules and/or restrictions on how or when service providers may contact you or on other bidding procedures.

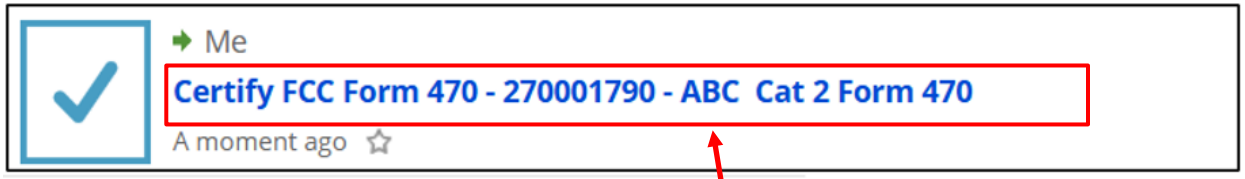
For example:
-- All bids must be submitted to X person by X date in X format
-- Vendor must provide discounted bills
-- Vendor must submit 3 references of district officials where identical services were provided within last 2 years
-- Vendors must attend pre-bid meeting on X date
-- ETC

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

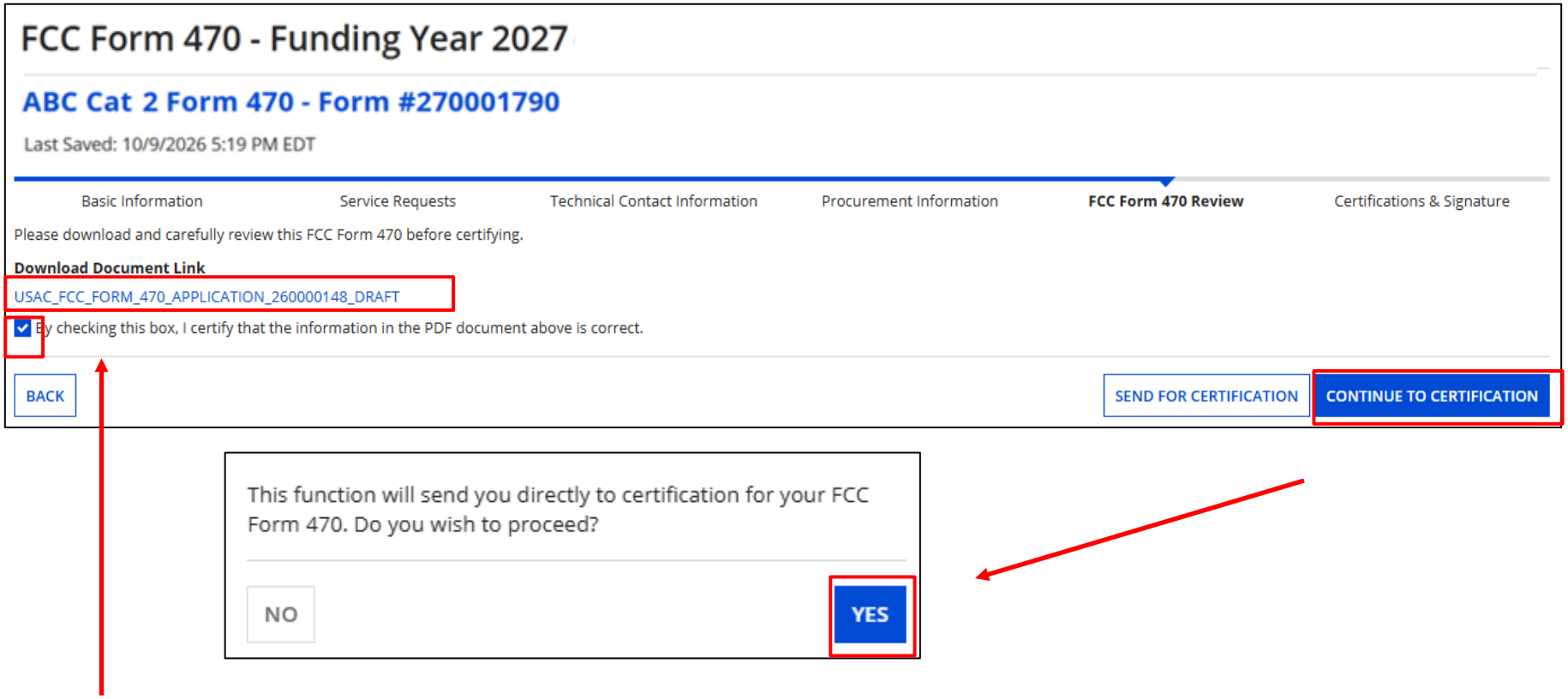
Review Form 470





When you advance to this screen, your Form 470 is generated as a “Task”. Click on “Tasks” and then the item labeled as “Certify FCC Form 470” with the nickname you provided.

Certifying Form 470



Click on the document link to view the PDF. If correct, click box to certify. If not, click on "Back" to make corrections.

If you have the authority to certify application, click on "Continue to Certification" and choose "Yes" in the pop-up. Choose "Send for Certification" if someone else will certify.

Certifying Form

Certify FCC Form 470

ABC Cat 2 Form 470 - Form #270001790

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

Please complete the certifications below.

Applicant Certifications

- [x] I certify that the applicant includes schools under the statutory definitions of elementary and second profit businesses, and do not have endowments exceeding $50 million.

Other Certifications

- [x] I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidde submitted will be carefully considered and the bid selected will be for the most cost-effective service educational needs and technology goals.
- [x] I certify that I will retain required documents for a period of at least 10 years (or whatever retention funding year or the service delivery deadline for the associated funding request. I certify that I will re for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that
- [x] I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding re form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b)
- [x] I acknowledge that FCC rules provide that persons who have been convicted of criminal violations o subject to suspension and debarment from the program.
- [x] I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be us for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 3 promise of anything of value, other than services and equipment sought by means of this form, fro services.
- [x] 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.

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

NOTICE

In accordance with Section 54.503 of the Federal Communications Commission's ("Commission") rules, certain schools and libraries ordering services that are eligible for and seeking universal service discounts must file this Description of Services Requested and Certification Form (FCC Form 470) with the Universal Service Administrator. 47 C.F.R. § 54.503. The collection of information stems from the Commission's authority under Section 254 of the Communications Act of 1934, as amended. 47 U.S.C. § 254. The data in the report will be used to ensure that schools and libraries comply with the competitive bidding requirement contained in 47 C.F.R. § 54.503. Schools and libraries must file this form themselves or as part of a consortium.

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

The FCC is authorized under the Communications Act of 1934, as amended, to collect the information requested in this form. We will use the information you provide to determine whether you have complied with the competitive bidding requirements applicable to requests for universal service discounts. If we believe there may be a violation or a potential violation of any applicable statute, regulation, rule or order, the information you provide in this form may be referred to the Federal, state, or local agency responsible for investigating, prosecuting, enforcing, or implementing the statute, rule, regulation or order. In certain cases, the information you provide in this form may be disclosed to the Department of Justice or a court or adjudicative body when (a) the FCC; or (b) any employee of the FCC; or (c) the United States Government is a party of a proceeding before the body or has an interest in the proceeding. In addition, information provided in or submitted with this form, or in response to subsequent inquiries, may also be subject to disclosure consistent with the Communications Act of 1934, FCC regulations, the Freedom of Information Act, 5 U.S.C. § 552, or other applicable law.

If you owe a past due debt to the federal government, the information you provide in this form may also be disclosed to the Department of the Treasury Financial Management Service, other Federal agencies and/or your employer to offset your salary, IRS tax refund or other payments to collect that debt. The FCC may also provide the information to these agencies through the matching of computer records when authorized.

If you do not provide the information we request on the form, the FCC or Universal Service Administrator may return your form without action or deny a related request for universal service discounts.

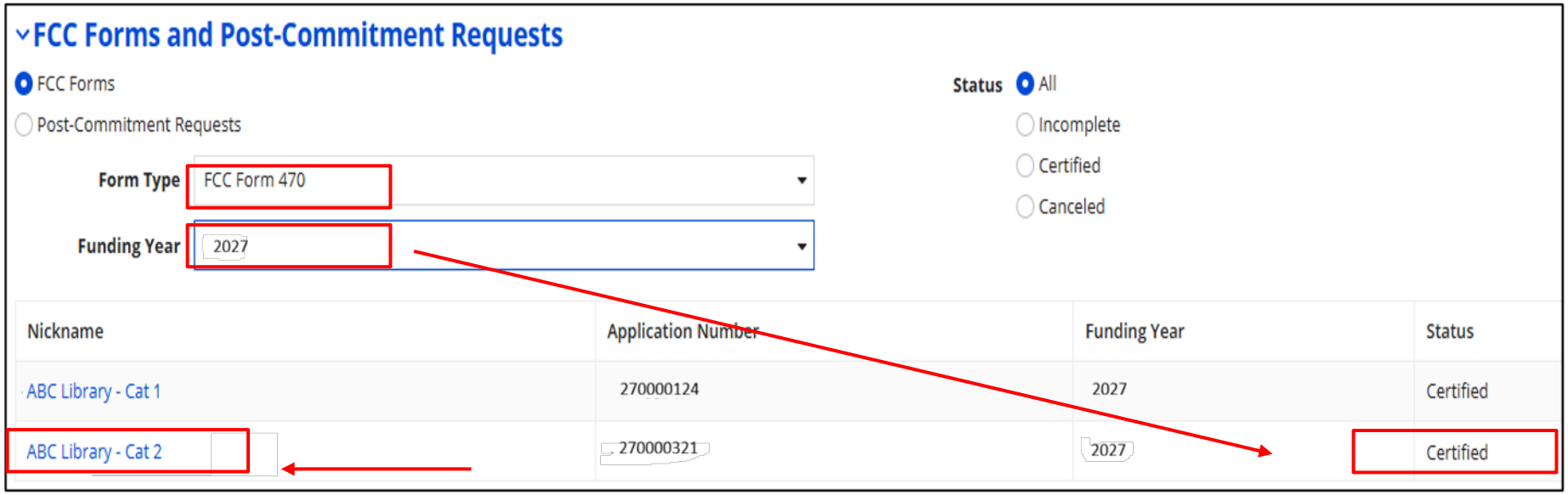
The foregoing Notice is required by the Paperwork Reduction Act of 1995, Pub. L. No. 104-13, 44 U.S.C. § 3501, et seq.

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

Check each box, and click on "Certify", and then "Yes" to complete the application.

Viewing/Editing Form 470



To find the Form 470, go to the bottom of the Landing Page and search. Select **2027** for the funding year. Verify the status is listed as "Certified". It may take several minutes after submitting the Form 470 for the status to update from "Incomplete" to "Certified". Click on the Nickname to see a summary of the application.

Viewing/Editing Form 470

Records / FCC Forms 470

FY2027 - ABC Cat 2 - #270001790

Summary | Generated Documents | News | Related Actions

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

Please note: The following fields pull the most current data from the Contact User Profile and Applicant Entity Profile: Recipient(s) of Service, Contact Name, and Contact Phone Number. If you would like to review this FCC Form 470 with the data that was present upon certification, please navigate to the Generated Documents related dashboard on the left-hand side and click the Original Version document link.

Application Information

Nickname	ABC Cat 1 & Cat 2
Application Number	270001790
Funding Year	2027
Status	Certified
Allowable Contract Date	11/9/2026

Created Date	10/12/2026 4:25 PM EDT
Created By	FirstName LastName
Certified Date	10/12/2026 4:25 PM EDT
Certified By	FirstName LastName
Last Modified Date	10/12/2026 4:25 PM EDT
Last Modified By	FirstName LastName

Verify the **"Allowable Contract Date". Contracts can be awarded on or after this date.**

Services Requested

There are no Services Requested For Category 1

Category 2: Internal Connections and Managed Internal Broadband Services

Type	Function	Number of Entities	Quantity	Unit	Manufacturer	Manufacturer Other Description	Installation and Initial Configuration?	Associated RFP
Internal Connections	Wireless Access Points and Necessary Software and Licenses		100	Each	Meraki or equivalent		Yes	View RFP Documents
Basic Maintenance of Internal Connections	Wireless Access Points	3	100	Each	Meraki			View RFP Documents

Verify the services listed.

Viewing/Editing Form 470

Records / FCC Forms 470

FY2027 - ABC Cat 2 - #270001790

Summary | Generated Documents | News | Related Actions

Please note: The following fields pull the mo
Form 470 with the data that was present up

Application Information

Nickname	FY2025 Cat 1 - LG
Application Number	250000072
Funding Year	2025
Status	Certified
Allowable Contract Date	11/9/2024

Billed Entity Information

Name	Library System 103

Records / FCC Forms 470

FY2027 - ABC Cat 2 - #270001790

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 even if the RFP document did not exist 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.

Cancel this FCC Form 470
This function allows you to cancel your certified FCC Form 470 if it has not yet been cited on an incomplete, certified or committed FCC Form 471.

Click on “Related Actions” for a list of options for corrections/changes. The two highlighted in red above are newer options: the ability to add an RFP or cancel the Form 470.

Viewing/Editing Form 470

Records / FCC Forms 470

FY2027 - ABC Cat 2 - #270001790

Summary Generated Documents

Edit Application Nickname
This function allows you to upd

Add an RFP Document
This function allows you to uplo

Change Main Contact Person
This function allows you to upd

Edit Technical Contact
This function allows you to upd

Cancel this FCC Form 470
This function allows you to can

Upload RFP

Changes to the FCC Form 470, including uploading a new RFP document, may require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or submitting and certifying an FCC Form 471. Ministerial or clerical errors, such as updating contact information, do not require a reset of the 28-day waiting period. However, changes that materially affect the competitive bidding process, such as changing the services or equipment being requested, do require restarting the 28-day waiting period.

If you are requesting bids for additional equipment, services, or recipients of service not included on the original FCC Form 470, you may need to file a new FCC Form 470.

Please review the USAC.org for additional guidance.

Does this new RFP constitute a substantial change to your FCC Form 470?*

- (●) Yes
- ( ) No

If you select yes, the 28-day waiting period will reset, and the Allowable Contract Date on your FCC Form 470 will be updated accordingly. If the new Allowable Contract Date prevents you from certifying the FCC Form 471 before the application window closes, you must request a waiver from the Commission after certifying the FCC Form 471.

Uploading a new RFP document with substantial changes and not waiting the minimum 28 days may result in denial of funding.

Please add an RFP here*

UPLOAD *Drop file here*

Associate RFP to Service Request(s)

Category 1: Data Transmission and/or Internet Access

Please select the service request(s) that apply to the RFP uploaded above.

	Type	Function	Number Entities	Quantity	Unit	Min Capacity	Max Capacity	Installation and Initial Configuration?	Associated RFP
☐	Data Transmission and/or Internet Access	Mobile Service For Use On School Buses	15	15	Each				View RFP Documents

If adding an RFP document, you will be asked if a substantial change is being made, such as adding new service or quantities. If so, your 28-day waiting period will restart. Upload the file, and then select the service to associate the new RFP document with.

Bidding Option #2: Issue PEPPM Mini-Bid

E-rate in Pennsylvania

EMERGENCY CONNECTIVITY FUND | TRAINING | DISCOUNT CALCULATIONS | PA FUNDING | HELPFUL DOCUMENTS | PEPPM CONTRACT | KEY LINKS

Home | Where To Start | Listserve Archive

Home » PA State Master PEPPM Contract E-rate Information

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 2024**, and then use the attachments below to complete the process.

PEPPM E-rate Bidding Guide 2024

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**)*

Option 2) Conduct a 'PEPPM Mini-Bid'

A complete guide to conducting a PEPPM Mini-Bid will be posted at: http://E-Ratepa.org/?page_id=6121

- **Do NOT post a Form 470**
- Conduct a PEPPM mini-bid of all product lines in a specific "Category" and then consider all bids submitted by vendors
  - Categories are wireless equipment, switches, routers, firewalls, UPSs, cabling/connectors, racks, and caching servers
- There is no 28-day mini-bid requirement, but you should give vendors at **least 14 calendar days** to submit proposals
- 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.
- Schools will then contact the winning vendor to obtain a contract document (or final quote with exact quantities) for the District to sign

*Note: The PEPPM Mini-Bid process is **not** intended for structured cabling projects or MIBS services.*

PEPPM Mini-Bid Process

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

	A	B	C	D	E	F	G	H	I	J	K
1	Name of District	E-rate Funding Year 2022									
2											
3	BIDDER INFORMATION:	Company Name:									
4		Company SPIN:									
5		Contact Name:									
6		Contact E-mail:									
7		Contact Phone:									
8											
9	To Be Completed by School						To Be Completed by Vendor		Only required for vendors submitting equivalent product line quotes (different manufacturer than Column C)		
10	School/Building Name (Optional)	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*
11											
12											
13											
14											
15											
16											
17											
18											
19								$0.00			
20	Compatibility/Interoperability Requirements - To Be Completed by School										
21	If vendors are bidding an "equivalent" product line that is different than what is listed in Column C, 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										
22	follows:										
23	*Schools: List below what existing equipment/software/systems any proposed equivalent equipment must be fully compatible with. Be specific.*										

PEPPM Mini-Bid Process

2. Create a cover e-mail (**Attachment B**)
   - ✓ Modify cover e-mail as needed
   - ✓ Update yellow areas, at minimum
   - ✓ Copy and paste into 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 Mini-Bid Process

3. Open the most current 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 all of the e-mail addresses from Column Q 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.

Manufacturer	PEPPM Awarded Vendor Name	Wireless Equipment/Services	Cabling/Connectors	Caching Servers	Firewall Equipment	Switches	Routers	UPS	Racks	Awarded Vendor Contact Name	Awarded Vendor Contact Em
ACE Computers	Ace Computers			x						John Samborski	johns@acecomputers.com
Actiontec	CDWG	X	X							Mark Ellis	markeli@cdwg.com
Adtran, Inc.	ADTRAN	X				X	X			Patrick Foster	patrick.foster@adtran.com
ADVA Optical Networkir	Walker and Associates, Inc		X		X	X	X			Scott Stoll	scott.stoll@walkerfirst.com
Aerohive Networks	Aerohive Networks	X				X	X			Sarah Page	spage@aerohive.com
Alcatel-Lucent	Alcatel-Lucent Enterprise	X				X	X			David Croston	david.croston@al-enterprise
Allied Telesis, Inc	En-Net Services, LLC	X			X	X	X			Ed Floyd	efloyd@en-netservices.com

EXAMPLE - DO NOT USE

Next Steps…

Next Steps – All C2 Procurements

- Vendors will submit proposals directly back to the contact indicated on the 470/RFP or PEPPM mini-bid
- After the bid due date, ensure bids are compliant with minimum qualifications and then conduct bid evaluation
  - Be sure that the price of eligible equipment and services is the most heavily weighted factor
  - If a bid is disqualified, note the bid and reason for DQ
    - Reminder: All DQ factors must be listed in 470/RFP
- Contact the winning vendor to seek a 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 the school or library signs. Be sure to include:
    - Contract signing date (must be before 471 filing date)
    - Contract term: **4/1/2027 through 9/30/2028 (for Internal Connection requests)**
    - Purchase is contingent upon E-Rate funding and local funding approval
- Create a Contract Record in EPC and upload the contract
- Submit the Form 471 by the March 2027 deadline

Bid Evaluation Matrix Example

Factor	Points Available	Vendor A	Vendor B	Vendor C
Proposal Cost		$750	$800	$1000
-- Weighted Points (% to lowest bid)		100%	80%	75%
Price of Eligible Services/Equipment (weighted)	60	60	48	45
Ability to Meet Installation Timeline	20	10	20	10
Quality of Proposed Solution	10	10	10	10
References	10	5	10	5
TOTAL POINTS		85	88	70

C2 Purchasing Reminders

- ✓ Create and Maintain Asset Inventory
  - All audits require this to be submitted
  - Sample available

  http://E-Ratepa.org/wp-content/uploads/2014/03/Asset-Register-Sample.xlsx

- ✓ 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

- ✓ After USAC has issued your C2 FCDL, refer to this C2 purchasing guide for next steps: https://e-ratepa.org/wp-content/uploads/2014/03/Equipment-Purchasing-Guide-FY-2024.pdf

General Category 2 Bidding Timeline

- Post 470 before December 1
- Bids due 29 days after 470 is posted (**or after vendor questions are answered** or additional RFP documents uploaded)
  - You may want to consider providing a deadline for vendor questions on the Form 470, and make the bidding deadline 29 days from that date
- Evaluate bids early January
- Seek board approval at 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

QUESTIONS

Where to Go for E-Rate Help

- **USAC's Client Service Center (CSC)**
  - E-Rate "Help Desk" where applicants & service providers can get answers to questions
  - Call **888-203-8100**
  - Submit a 'Customer Service Case' in EPC
- **PA E-Rate Coordinator**
  - E-mail lgermann@e-ratepa.org
  - Attend webinars!
  - Read listserve messages! https://e-ratepa.org/?page_id=7751
  - www.e-ratepa.org
  - Helpful Documents: http://e-ratepa.org/?page_id=754
  - Training: http://e-ratepa.org/?page_id=745