

Competitive Bidding

My Bids are In! Now What?

Training Topics

E-RATE



1. Opening Bids
2. Evaluating Bids
3. Duplicative Services
4. Gift Rules
5. Contracts
6. Contract Module

Prior to Bid Opening

Competitive Bidding Requirements

- The competitive bidding process must be open and fair.
 - **Open** = information shared with one bidder must be shared with all.
 - **Fair** = bidders must be evaluated fairly and equally.
- 28-Day Waiting Period
 - FCC Form 470 must be posted on the USAC website for a minimum of 28 days before you select a vendor and file an FCC Form 471.
- You must comply with all E-rate, state, and local procurement requirements.

Competitive Bidding

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Bid Opening



Bid Opening

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- Announced in 470/RFP
- Public
- Sign-in sheet
- Calendar invitations
- Notes/documentation
- Open SEALED bids
- Read off vendor name/amount of bid



Bid Evaluation

Evaluating Bids

- To evaluate incoming bids, create a bid evaluation matrix or similar document.
- Develop evaluation criteria or factors to assess the bids.
 - You can have one or many factors.
- Assign each evaluation factor a point value or percentage.
 - The price of the **eligible products and services** must be the most heavily weighted factor.
 - Other factors, including other price factors, can be considered as well; but they cannot be weighted equally or higher than cost of the eligible goods and services.
- The vendor with the most overall points is the winner.

Bid Evaluation

Sample: Bid Evaluation Matrix

- Evaluate your bids using a matrix, filled in with your chosen factors and point values.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the ELIGIBLE products and services	50	15	50	35
Prior experience w/vendor	20	20	0	20
Service provider bonded	20	7	13	20
Local or in-state vendor	10	10	8	7
Total	100	52	71	82

- Vendor #3 wins. Note that this may not be the lowest cost vendor.

Bid Evaluation

E-RATE

Evaluating Bids: Zero or One Bid Received

- If you receive only one bid, and it is cost-effective, you may accept it.
 - Document your decision with a memo or email to your file.
- If you did not receive any bids, you can solicit bids after the 28-day waiting period.
 - Reach out to vendors in the area.
 - Ask your current service provider to submit a bid or confirm they are willing to continue services at your current level and cost.



Bid Evaluation

E-RATE

Duplicative Services

- Duplicative services are services that provide the same functionality for the same population in the same location during the same period of time.
- Backup services - services sought to reduce reliance on any single service provider's network during an outage - are considered duplicative.
- Services that provide necessary bandwidth requirements, such as multiple T-1 lines when appropriate for the population served and the services to be received, may not be considered duplicative. However, the applicant must still evaluate and choose the most cost-effective option from the bids received.
- USAC cannot fund duplicative services.



Fair and Open Competition: Gift Rules

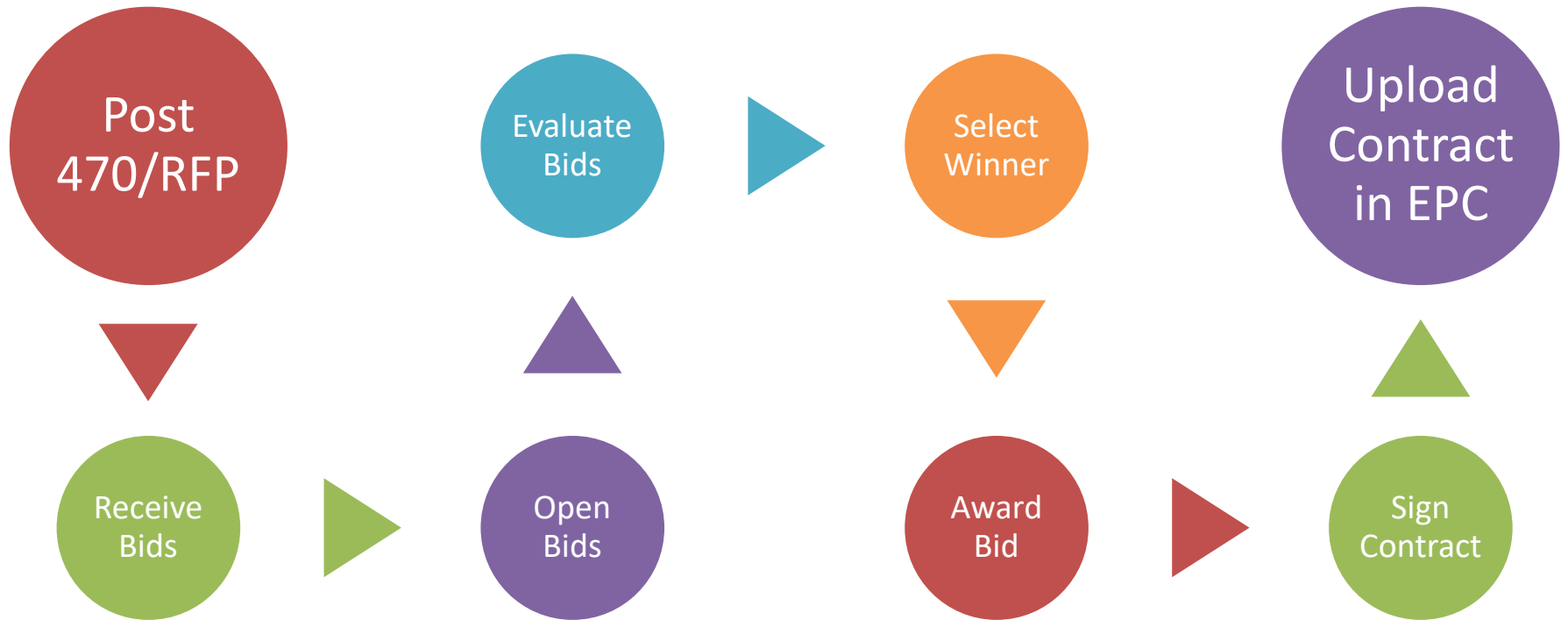
- Receipt or solicitation of gifts by applicants from service providers (and vice versa) and potential service providers is a competitive bidding violation.
- Service providers may not offer or provide any gifts or thing of value to applicant personnel involved in E-rate.
- Gift prohibitions are always applicable, not just during the competitive bidding process.
- Exceptions for gifts must be 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.

[USAC's Gift Rules Video](#)



Process

E-RATE



Contracts

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- Applicants must have a signed contract or ***other legally binding agreement*** in place prior to submitting their FCC Forms 471 to USAC.
- Applicant must not sign a contract before the Allowable Contract Award Date (ACD).
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.



Contract Module

E-RATE

- New contracts or addendums to current contracts should be uploaded to EPC
- All information should be entered
- Funding requests will be tied to these contracts
- If not uploaded will be requested during PIA



Contract Module

E-RATE

My Applicant Landing Page



[Funding Request R](#)
[IDD Extension](#) | [FCI](#)
[Users](#) | [Manage Or](#)

Welcome, [School District 10814!](#)

Pending Inquiries

Type

Funding Year

Application/Reque



Contract Module

E-RATE

Records / Applicant Entities

#10050 - School District 10814

 [CREATE A NEW USER](#) [ADD OR REMOVE EXISTING USERS](#) [MANAGE USER PERMISSIONS](#) [..](#)

- Summary**
- Customer Service
- Modifications
- Additional Information
- Discount Rate
- Category Two Budget
- Contracts**
- FCC Forms
- FRN Appeals
- News
- Related Actions


Organization Details

Name School District 10814
Entity Number 10050
FCC Registration Number 0123456789

Applicant Type School District
Status Active


Contract Module

E-RATE

News Tasks **Records** Reports Actions  Appian

Records / Applicant Entities

#10050 - School District 10814

 **MANAGE CONTRACTS**

Summary Customer Service Modifications Additional Information Discount Rate Category Two Budget **Contracts** FCC Forms PPN Appeals

News Related Actions

Contract Module

E-RATE

Manage Contracts

Contracts - School District 10814 (BEN: 10050)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

My Contract Drafts

You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE



Contract Module

E-RATE

School District 10814 (BEN: 10050) -- Contract ID

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract ⓘ*

Contract Number ⓘ

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

Create Contract

School District 10814 (BEN: 10050) - Test Contract FY21 - Contract ID #

- Contract Information
- Establishing FCC Form 470
- Service Provider
- Contract Dates
- Pricing Confidentiality
- Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract ? *

Test Contract FY21

Contract Number ?

DPITestC2FY21

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

E-RATE

Contract Information

Contract ID #6894 [?](#)

Would you like to upload a copy of your contract? [?](#)

YES ✓

NO

Contract Document Upload

Please upload and describe each document related to your contract.

UPLOAD  Drop file here

Describe this contract document.

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

E-RATE

Contract ID #6894 [?](#)

Would you like to upload a copy of your contract? [?](#)

YES ✓

NO


Contract Document Upload

Please upload and describe each document related to your contract.



Contract
DOCX – 12.68 KB

UPLOAD

 Drop file here

Describe this contract document.

WAN Contract 2021-2025 XYZ Vendor 60 months, 2 voluntary extensions

Describe this contract document.



Contract Module

Here you will answer additional questions about this contract.

Contract Information

Is this contract based on a State Master Contract? [?](#)

YES NO ✓



Is this contract based on a multiple award schedule? [?](#)

YES NO ✓



Contract Module

E-RATE

Contract Information

Can other applicants piggy back off this contract? [?](#)

YES

NO ✓

Was this contract originally created by another applicant, and you then piggy backed off their contract? [?](#)

YES

NO ✓

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

E-RATE

Establishing FCC Form 470

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

YES ✓ NO



Was your FCC Form 470 posted prior to Funding Year 2016?

YES NO ✓



Use the search tool below to find the establishing FCC Form 470.

Remember that the services in the contract had to be posted on the FCC Form 470.

Remember you cannot file your Form 471 before the Allowable Contract Date.

Search FCC Forms 470

Search by FCC Form 470 Number

Search by Nickname (Partial or Full)

Search by BEN

10050

Search for your 470 #, select it!

How many bids were received? ⓘ *

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



Contract Module

E-RATE

Service Provider

Enter Acct. # if you have one.

Account Number (e.g., billed telephone number)

If your service provider has given you one or more Account Numbers, please enter them.

Please select the service provider for this contract using the search below.

Search Service Providers

Search by SPIN

Enter SPIN # of vendor/search!

Search by Name (Full or Partial)

CLEAR FILTERS

SEARCH



Contract Module

E-RATE

Search Service Providers

Search by SPIN

Search by Name (Full or Partial)

CLEAR FILTERS

SEARCH

*

<input type="checkbox"/>	SPIN	Name	Doing Business As	State
<input checked="" type="checkbox"/>	14010001	USAC Service Provider Organization 1		VA
<input type="checkbox"/>	14010002	USAC Service Provider Organization 2		VA
<input type="checkbox"/>	14010003	USAC Service Provider Organization 3		VA
<input type="checkbox"/>	14020001	FCC Service Provider Organization 1		VA
<input type="checkbox"/>	14020002	FCC Service Provider Organization 2		VA

< 1 - 5 of 9 >

Check the correct box and continue



Contract Module

E-RATE

School District 10814 (BEN: 10050) - Test Contract FY21 - Contract ID #6894

Last Saved: 11/16/2020 1:53 PM EST

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will answer additional questions about the dates on your contract.

Contract Dates

Is this a multi-year contract?

YES ✓

NO

Answer accordingly

BACK

CANCEL

Enter date you or BOE awarded contract to vendor.

What is the date you awarded your contract? *

|mm/dd/yyyy

November 2020						
SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

on each FRN where you cite this

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

Contract Dates

Does this contract include voluntary extensions?

YES ✓ NO

Answer accordingly!

What is the contract expiration date if all extensions are exercised? *

06/30/2027

How many extensions are left on the contract? *

2

Enter the number of voluntary extensions that you could still exercise on this contract.

What is the total remaining length of the contract if you exercised all extensions (in months)? *

84

Enter the number of months that would remain in the contract if you exercised all voluntary extensions.

Contract Module

E-RATE

Contract Information

Establishing POC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Continuation

Here you will answer additional questions about applicable publication restrictions on this contract.

Pricing Confidentiality

Is there a statute, rule, or other restriction which prohibits publication of the specific pricing information for this contract?

YES

NO ✓

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE



Contract Module

E-RATE

Create Contract: Confirmation

School District 10814 (BEN: 10050) - Test Contract FY21 - Contract ID #6894

Last Saved: 11/16/2020 1:57 PM EST

Contract Information Establishing FCC Form 470 Service Provider Contract Dates Pricing Confidentiality

Please review the information and submit the information below to complete this contract.

Contract Information

Nickname	Test Contract FY21	Contract ID	6894
Can Other Applicants Piggy Back Off This Contract?	No	Contract Number	DPITestC2FY21
Piggy Backed Off Another Contract?	No	Based on a State Master Contract?	No
		Based on a Multiple Award Schedule?	No

Contract Module

E-RATE

Establishing FCC Form 470

Establishing FCC Form 470 #170002427

Number of Bids Received 3

Service Provider

Service Provider USAC Service Provider Organization 1 (SPIN: 14010001)

Account Number

Contract Dates

Award Date 11/16/2020

Multi-Year Contract? Yes

Includes Voluntary Extensions? Yes

Extension Details:

- There are 2 remaining voluntary extensions.
- There are 84 months remaining in this contract if all extensions are exercised.
- This contract expires on 6/30/2027 if all extensions are exercised.



Contract Module

E-RATE

Pricing Confidentiality

There is no rule, statute, or other restriction which prohibits publication of the specific pricing information for this contract.

Supporting Documents

Document	Description
Contract	WAN Contract 2021-2025 XYZ Vendor 60 months, 2 voluntary extensions



BACK CANCEL

SAVE & CLOSE COMPLETE

Contract Module

E-RATE

Submitted Contracts

Contract ID	Contract Number	Contract Nickname	Award Date	
6894	DPITestC2FY21	Test Contract FY21	11/16/2020	View

Manage Contracts

Contracts - School District 10814 (BEN: 10050)

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Contract Type

My Contract Drafts

You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

CLOSE

Only DRAFTS can be edited!

ADD A NEW CONTRACT

EDIT

DELETE



What's Next?

E-RATE

- Contract will be tied to 471
 - Category 1 WAN or Internet
- Filing window opens in January
- NOW
 - Update numbers in Parent/Child entities for Discount and C2 budget
 - See training recording



Q&A



Upcoming Training

E-RATE

- *****NEW*****
Updating Entity Numbers for the 2021 Budget: Watch & Learn
(Please watch the EPC Overview and Admin Window Training below before attending this training).
November 18 from 3 – 4 PM
[Registration Link](#)
- *****NEW*****
Category 2 Budget & Mini-bid Training Session A
(for those who did mini-bids last year)
November 19 from 3:30 – 4:30 PM
[Registration Link](#)
- *****NEW*****
Category 2 Budget & Mini-bid Training Session B
(for those who did NOT do mini-bids last year)
November 19 from 10 AM – 12 Noon
[Registration Link](#)
- *****NEW*****
E-rate Documentation Retention – Rules to Live By
(Intended for all applicants, **New Applicants** highly encouraged to attend!)
December 9 11AM – 12 Noon
[Registration Link](#)



Resources

E-RATE

- NC E-rate Website: <https://erate.fi.ncsu.edu/>
- [2021 E-rate Handbook](#)
- [Usac.org/e-rate](https://usac.org/e-rate)
- Rebecca, Roxie and Mike!

Content courtesy of Universal Administrative Company, usac.org.

