

FY2025 Form 470 Cat 1 Workshop - Libraries

Presented by:

Lorrie Germann, State E-Rate Coordinator

The Purpose of the Form 470

The Form 470:

- Announces a school's intent to participate in the E-Rate program and lists the services desired:
 - Category 1
 - Internet Access/Transport (Bandwidth)
 - Hotspots for Bookmobile
 - Off-Premise Hotspots for Staff/Patrons
- Acts as an RFP
- Begins the mandatory 28-day competitive bidding process
- If a service is not listed on a Form 470, you cannot request it on a Form 471 (or it won't be funded)

Form 470

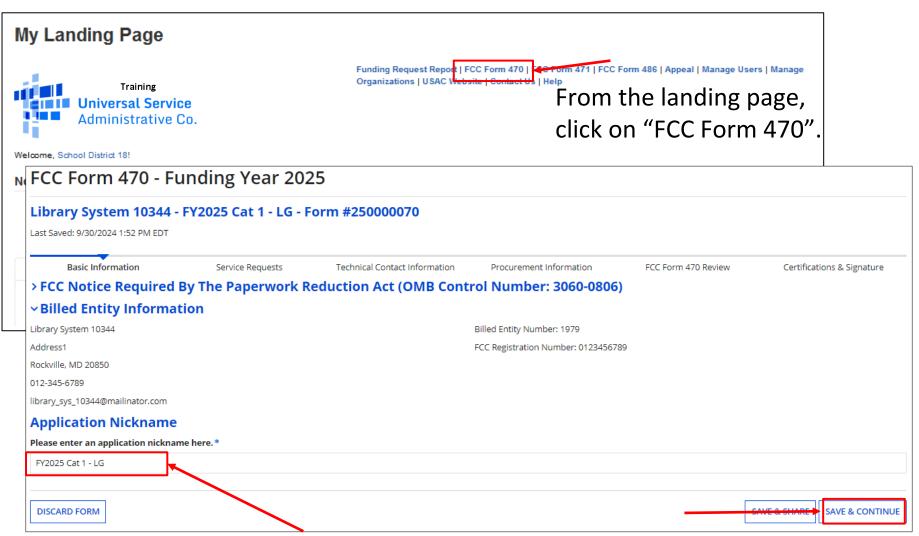
- You must apply for E-Rate funding each year
- The only time you don't need to file a Form 470 is in the second (or later) year of a multi-year contract which was established on a previous year's Form 470, or
- Using a CABIO service.

You must still file a 470 for everything else!

Changes to the FY2025 Form 470

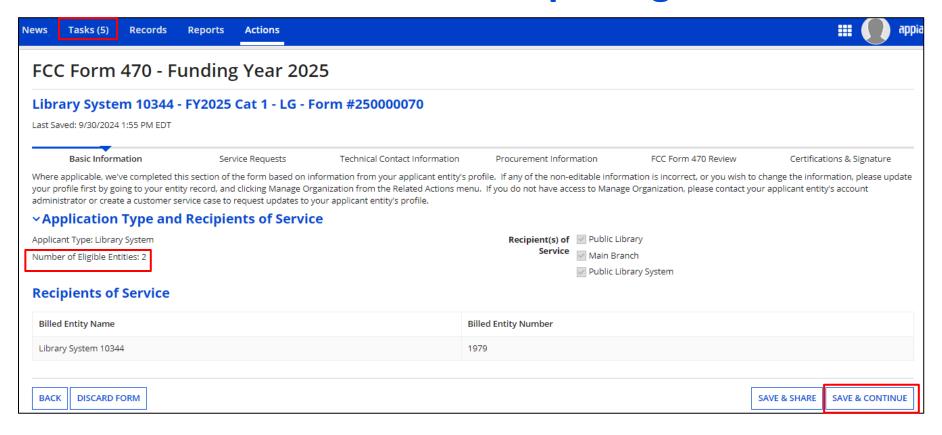
- Ability To Upload RFP and RFP Documents After Certification.
 - Applicants can upload an RFP (request for proposals) after the FCC Form 470 is submitted and certified in EPC but cannot remove RFP documents attached to your FCC Form 470.
 - If the new RFP changes the service originally requested (increasing bandwidth or quantities), you can restart the 28day waiting period; there is no need to refile!
- Ability To Cancel FCC Forms 470 and View Canceled Forms.
 - Applicants can view canceled FCC Forms 470 in EPC under Records -> FCC Forms 470 by selecting "Canceled" under the Status filter.
- Wi-Fi Hotspot Devices/Wireless Internet Services for Off-Premises Use.

Starting the Form 470



Enter Nickname (user defined) and click on "Save and Continue"

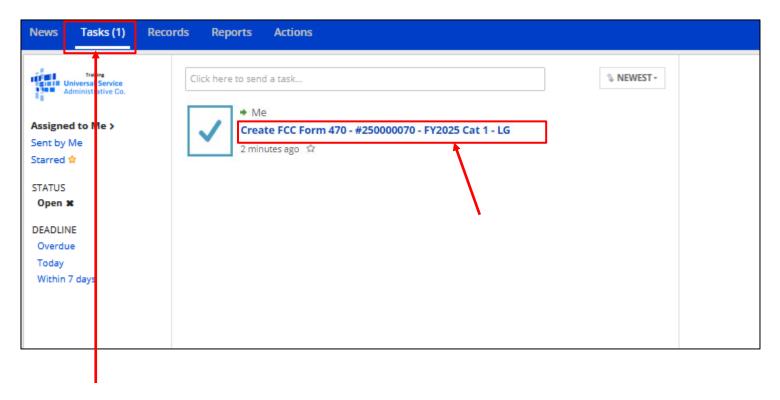
Completing the Form 470



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.

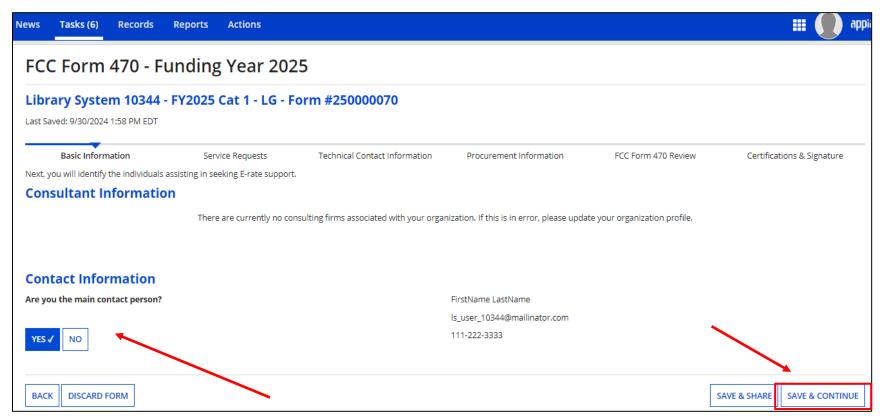
Tasks



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".

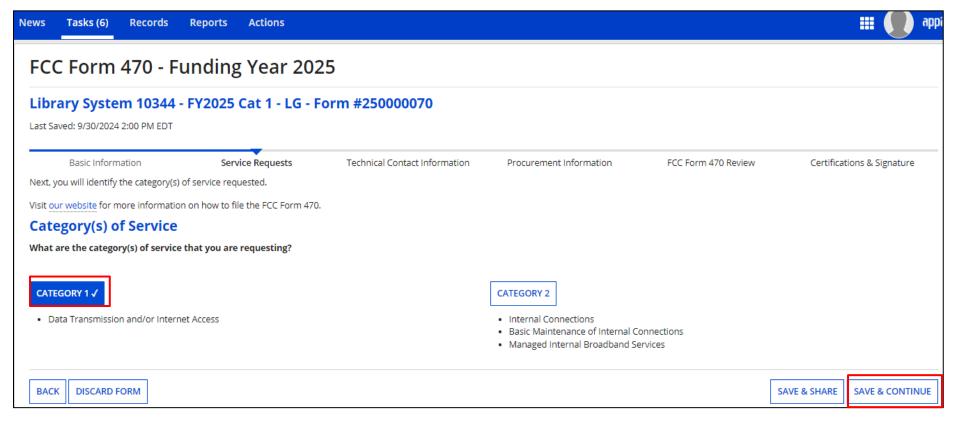
Contact Information



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.

Choosing Category of Service



Choose the "Category of Service" you are seeking.

On the Form 470, you can list services from both Category One and Category Two on the same application.

Adding An RFP



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

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

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

Simple RFP Examples

Cat 1:

Name	Address	Notes
CAMDEN BRANCH LIBRARY	104 S. Main Street, Camden, Ohio 45311	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320
ELDORADO BRANCH LIBRARY	150 N. Main Street, Eldorado, Ohio 45321	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320
NEW PARIS BRANCH LIBRARY	115 N. Washington Street, New Paris, Ohio 45347	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320
WEST ALEXANDRIA BRANCH LIBRARY	16 N. Main Street, Town Hall, West Alexandria, Ohio 45381	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320
WEST ELKTON BRANCH LIBRARY	135 N. Main Street, Town Hall, West Elkton, Ohio, 45070	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320
WEST MANCHESTER BRANCH LIBRARY	212 S. High Street, West Manchester, Ohio 45382	Point-to-Point connection to 450 S Barron St, Eaton, OH 45320

or

RFP for Wireless Service

BEN: 129000 - Ohio County Library

210 S Broadway St. Anytown, OH 44256

CONTACT: Jane Doe

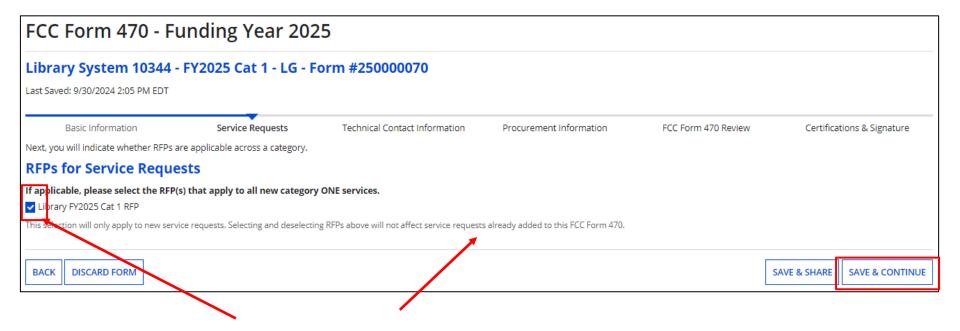
Jane.doe@ohiolibrary.org

740-555-1150

SERVICE: 2 wireless units with data for Library's Bookmobile and Kiosk

Entity 16069826 – Ohio County District Library Bookmobile Entity 17001766 – Ohio County District Library Kiosk – minimum 1 gbps with an unlimited maximum If applying for hotspot service for a bookmobile or kiosk, an RFP is required.

Choose RFP

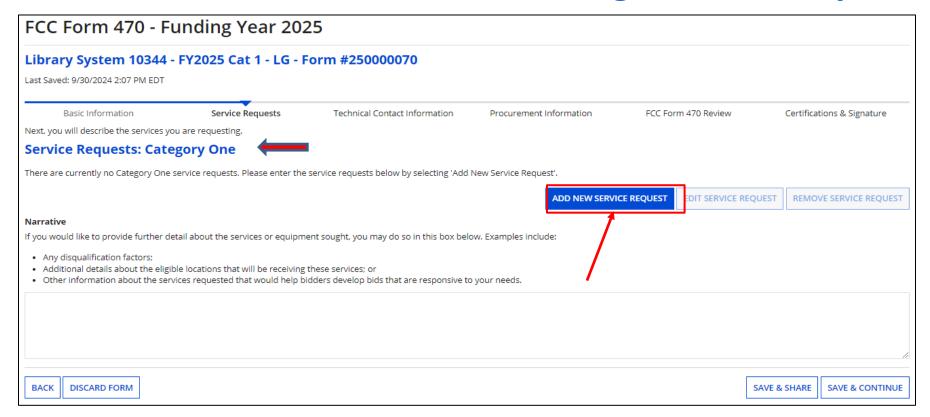


If applicable, select the RFPs that apply to all new Category 1 services.

If you answered "No" previously to RFP's, this screen would not display.



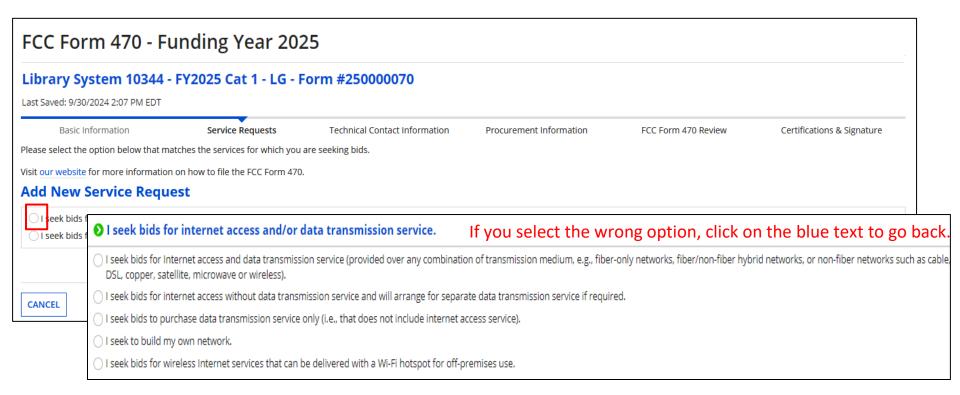
Adding Service Request



Category 1 is displayed first on the page. Click on "Add New Service Request" to add service/s.

You'll explain in the narrative what you're looking for, locations, and disqualification factors. If you uploaded an RFP with the information, you may state "See attached RFP for full details".

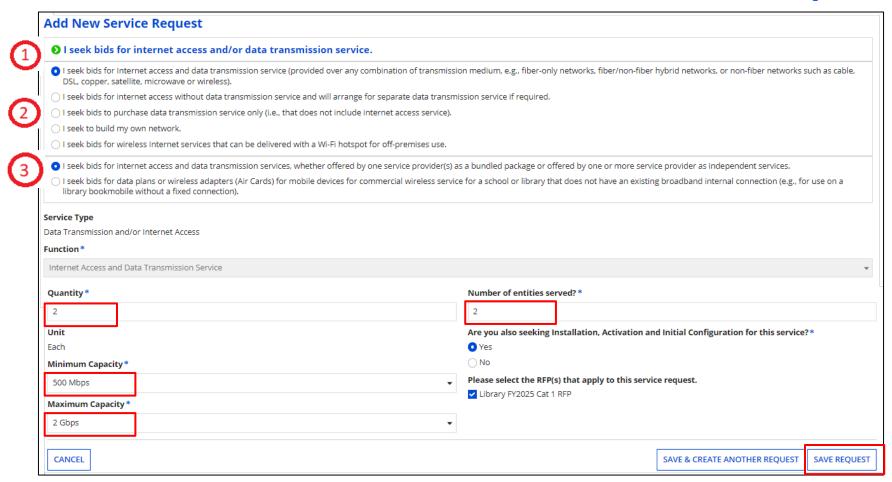
Adding New Service Request



Select the radio button for the service you're requesting. As you select an option that section will collapse, and you will drill down to identify the service further.

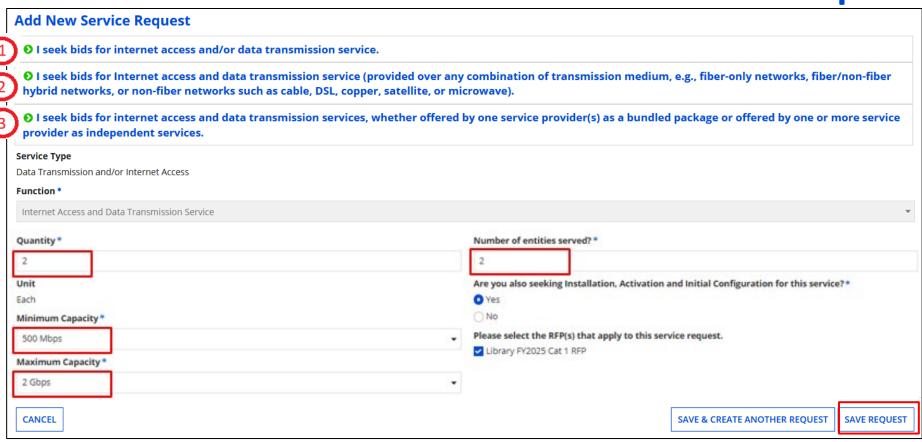
Here are the options.....

Internet Access and Bandwidth Options



Options for selecting both bandwidth and Internet Access as a bundle. Enter the number of circuits, entities, and minimum & maximum capacity. "Maximum" should include for future growth. Indicate if you want installation. If not sure, just say "Yes". RFP should be checked if added.

Internet Access and Bandwidth Request



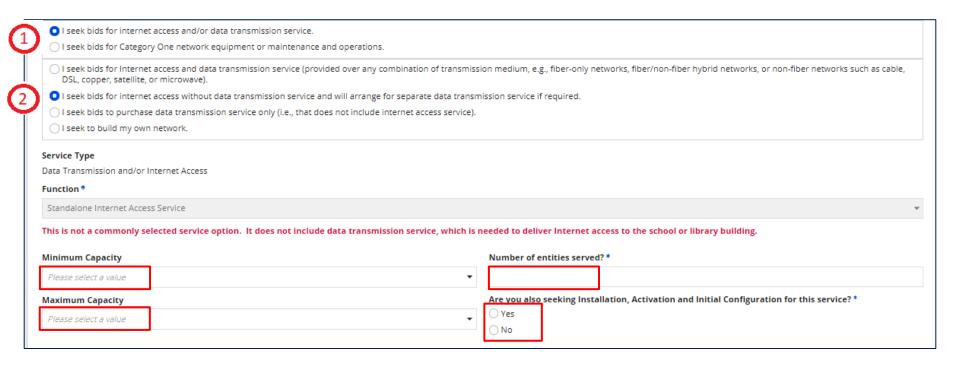
You'll see each of the collapsed options you've chosen along with the quantities and capacity. Click on "Save Request".

If you need to add another request using the **SAME service functions**, you can click on "Save & Create Another Request" and provide quantity, no. of entities, etc., but the collapsed options will be the same. **Not sure when you'd ever use that!!**

Data Plan Options

	equipment or maintenance and operations.				
	ta transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber ks such as cable, DSL, copper, satellite, or microwave).				
I seek bids for internet access without	data transmission service and will arrange for separate data transmission service if required.				
I seek bids to purchase data transmis	sion service only (i.e., that does not include internet access service).				
O I seek to build my own network.					
I seek bids for internet access and dat provider as independent services.	a transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service				
 I seek bids for data plans or wireless a broadband internal connections. 	adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing				
Service Type	Data plans for locations where this is the only option				
Data Transmission and/or Internet Access	for Internet Access, such as a Bookmobile, are eligible.				
	for internet Access, such as a bookinobile, are eligible.				
Function *	-				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for mo	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for mo	An RFP is required in this case.				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective o	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries.				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective o	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries.				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective of Quantity*	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configuration for the service?*				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective of Quantity* Unit	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configuration for the service?* Yes				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective of Quantity* Unit Lines	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configuration for the service?*				
Cellular Data Plan/Air Card Service Cellular data plans and air cards for modata plans are the most cost-effective of Quantity * Unit Lines Minimum Capacity *	An RFP is required in this case. bile devices are eligible only in instances when the school or library seeking support demonstrates that the individual ption for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configuration for the service?* Yes				

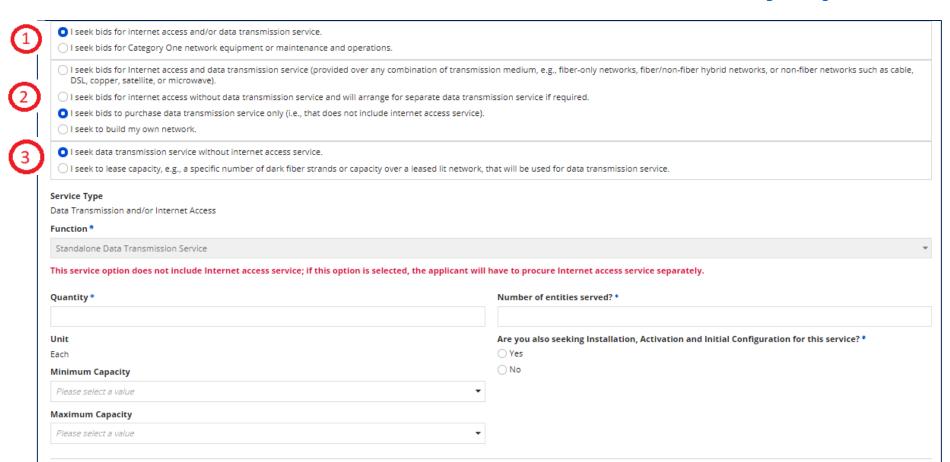
Internet Access Only Options



Option for selecting just Internet Access when priced separately, such as when circuits between buildings are owned by the library system. **Libraries** don't often choose this option!

Enter the number of entities and minimum and maximum capacity. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Bandwidth Only Options



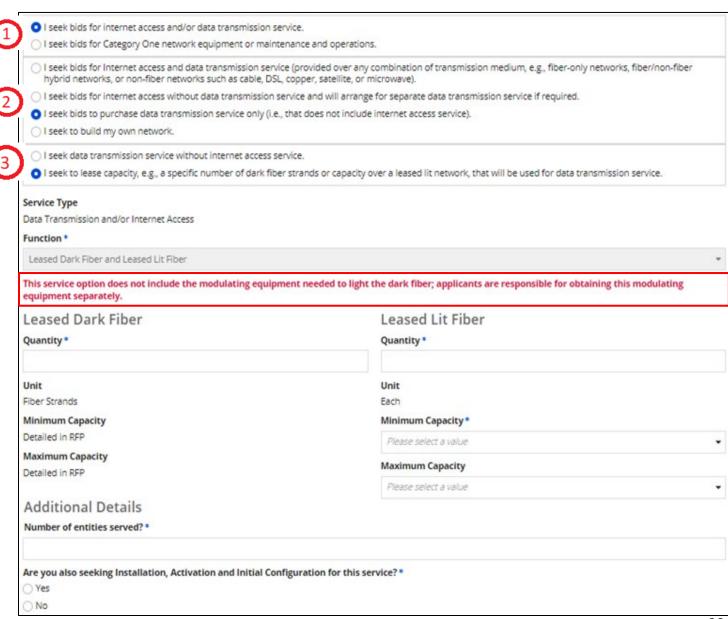
Options for selecting just bandwidth if Internet is provided or priced separately, such as libraries where Internet Access is provided by OPLIN. Enter the number of circuits, entities, and minimum & maximum capacity. "Maximum" should include for future growth. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Dark Fiber Options

Options if seeking
Dark Fiber, where
provider owns and
maintains the
fiber, but you're
required to light it.
If so, an RFP is
required stating
capacity, and you
must compare
Leased Lit Fiber

Enter the number of circuits, entities, and minimum & maximum capacity, and if seeking installation.

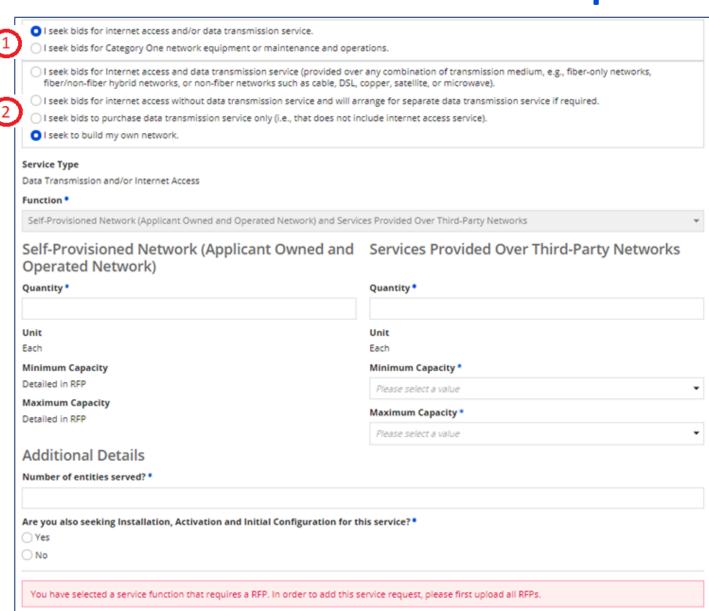
cost.



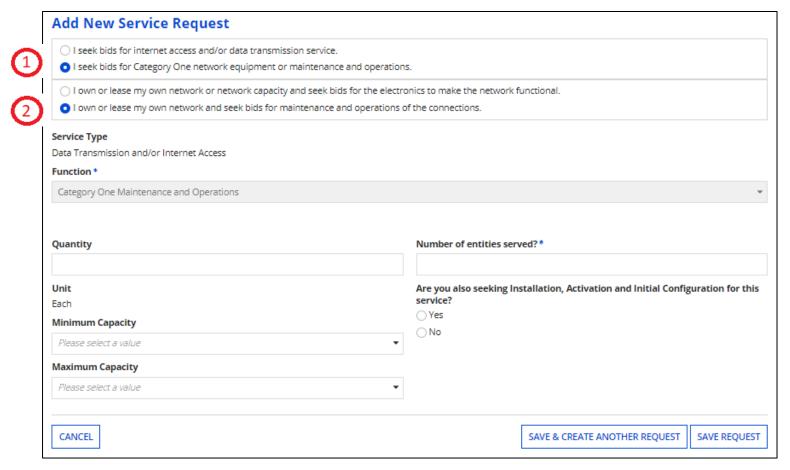
Self Provisioned Network Options

Self-Provision is when the applicant owns the fiber, lights it, and maintains it. Again, Libraries don't often choose this option!

If seeking, an RFP is required with capacity, and you must compare it to other options such as Leased Lit Fiber, microwave, etc.

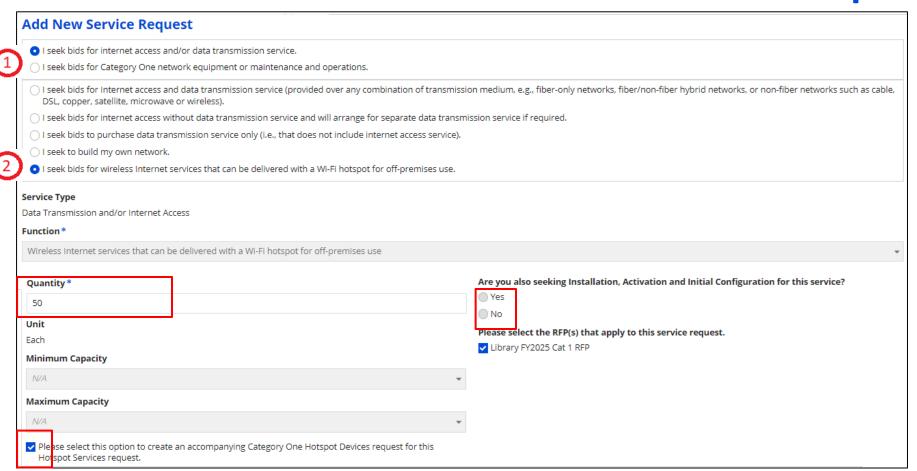


Maintenance/Operations Options



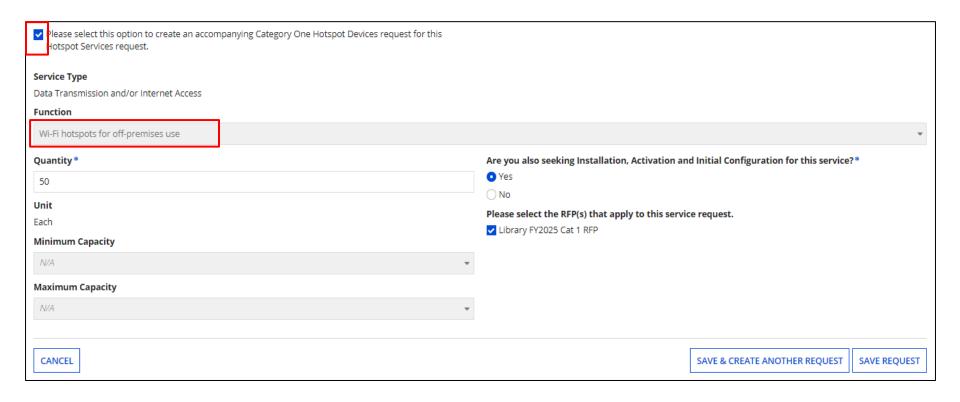
If requesting Maintenance and Operations of existing Dark Fiber circuits where only M&O will be charged. Enter the quantity, number of entities served, and minimum & maximum capacity. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Off-Premise Hotspots



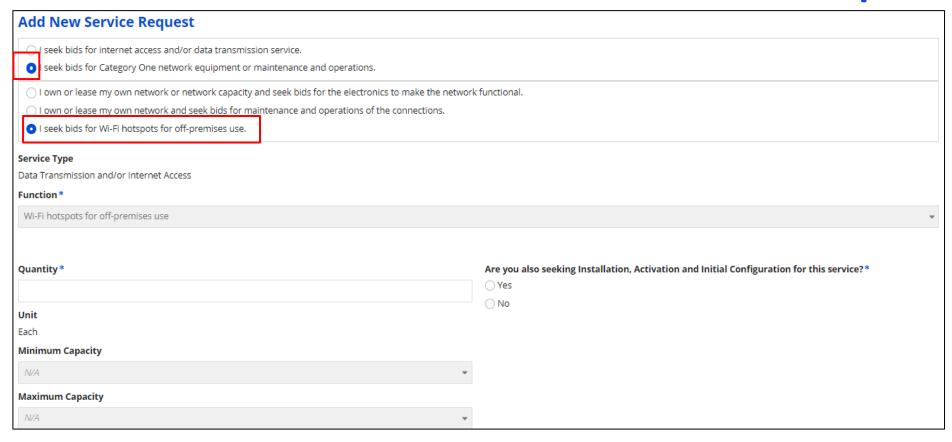
If you are requesting the **monthly recurring** Wi-Fi service, choose the last option for "Wi-Fi hotspots of off-premise use." Enter the quantity for which you're seeking service. Because this is for "service," the installation option and "Capacity" are greyed out. If you're only requesting monthly service, click "Save Request." If you also want to request "Hotspot Devices" (equipment), check the box "**Please select this option**" and scroll down.

Off-Premise Hotspots



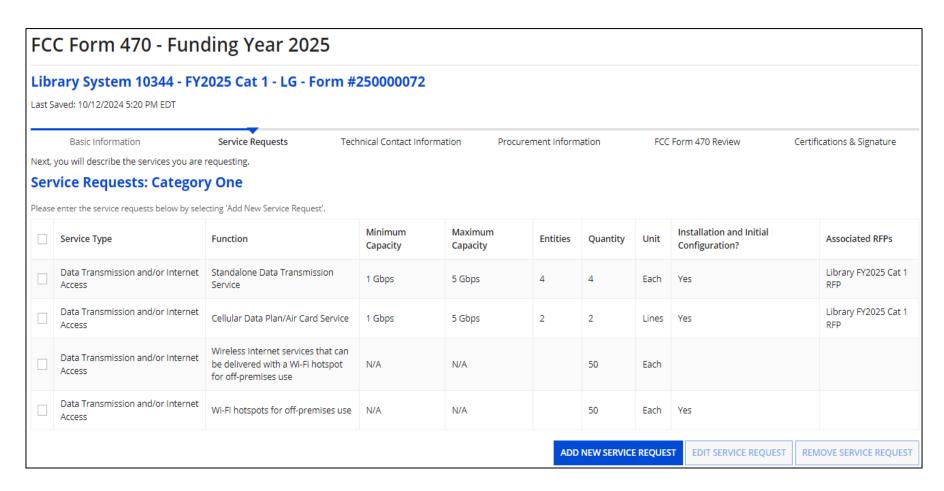
Checking the box will expand the option to add the devices. Enter the number of hotspot devices you're seeking. I suggest you check the box for "Installation, Activation, and Configuration" should there be any costs associated with the hotspot device.

Off-Premise Hotspots



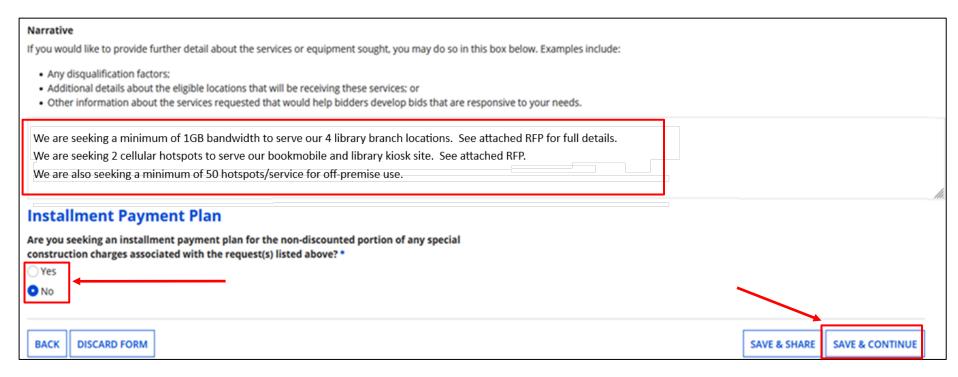
If you missed adding hotspot devices at the same time as adding the service, click on "I seek bids for Cat 1 network equipment....", you'll then see "I seek bids for Wi-Fi hotspots for off-premise use". Check the box for "Installation, Activation, and Configuration" should there be any costs associated with the hotspot device.

Adding New Service Request



Verify information. If you want to add additional Category 1 services, click on "Add New Service Request". If done, provide information in the Narrative text box.

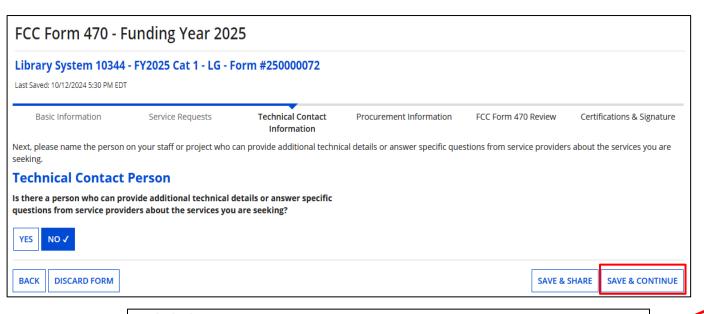
Narrative & Installment Plans



Provide any further details in the narrative to explain what you're looking for, locations, and any disqualification factors. You may state your preferred bandwidth but be careful there.

If seeking fiber installation with special constructions charges, you may request a payment plan for the "**non discount**" portion. Click on "Save & Continue".

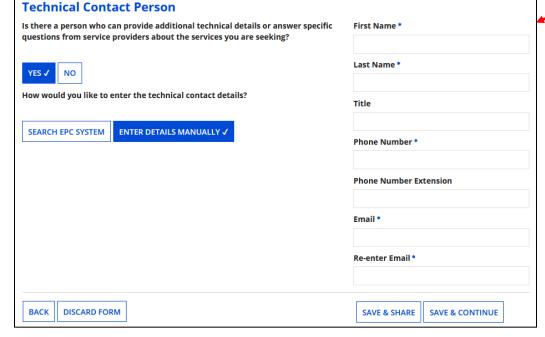
Adding Technical Contact



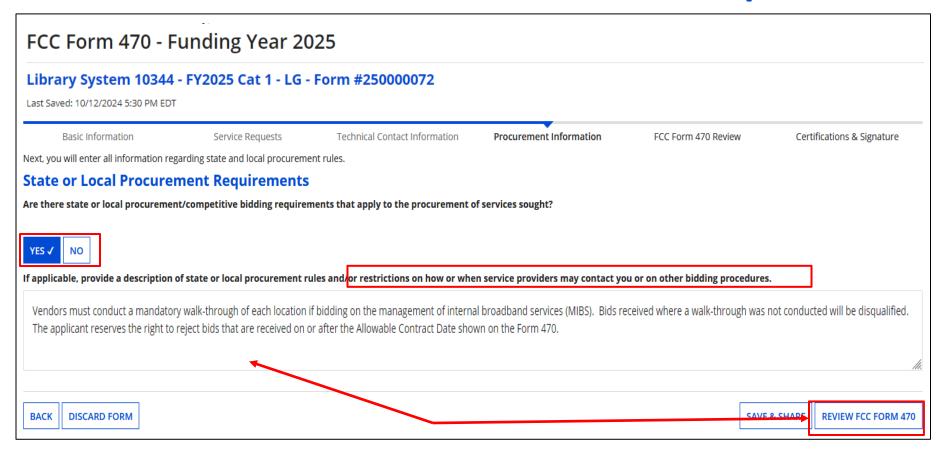
Choose "Yes" if you'd like to add a technical contact.

You can search and add an EPC user or manually enter contact details.

Do not add anyone affiliated with a service provider!!



Procurement Requirements



Indicate if there are State or Local procurement requirements, or any restrictions. You can list any disqualifying factors in addition to the Narrative.

Click on "Review FCC Form 470"

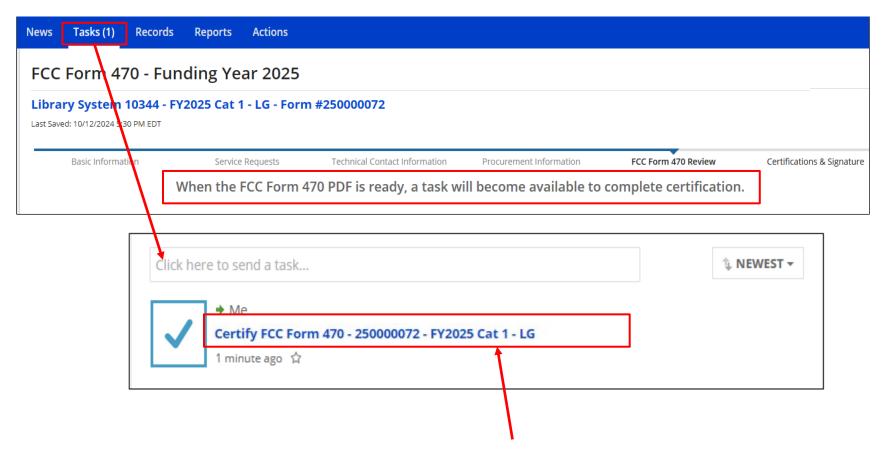
Procurement Requirements

- Vendor must have a SPIN at the time of awarding the contract.
- In-state (or local) vendors preferred.
- Previous experience with vendor preferred.
- Vendor must put in writing their willingness to give discounted bills.
- Must demonstrate the ability to meet the installation timeline.
- Vendors bidding on off-premise hotspot service must indicate the geographic area their service covers and identify whether there are any dead zones where there is no coverage
- The applicant reserves the right to reject bids that are received on or after 9:00 AM on the Allowable Contract Date shown on the Form 470.

A Word doc listing Disqualifying Factors can be found on my "Resource Library" page at

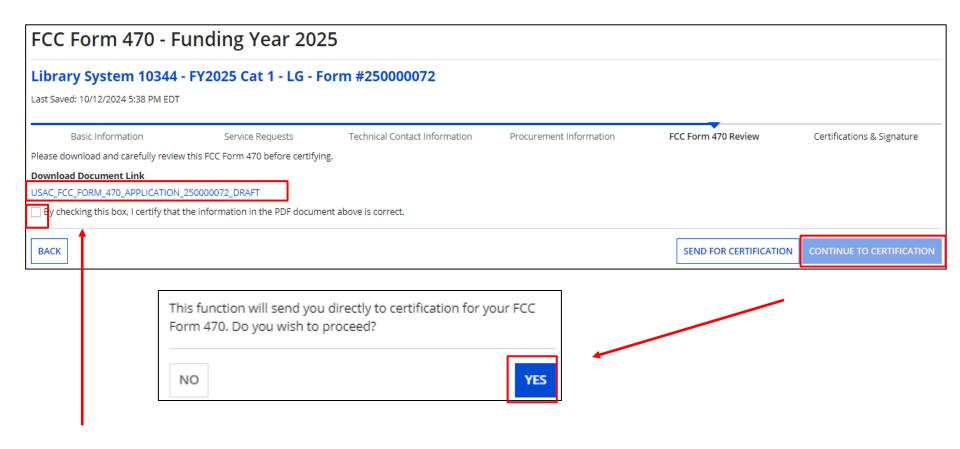
https://www.ohio-k12.help/e-rate-support/resource-library/.

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.

Certify FCC Form 470

Library System 10344 - FY2025 Cat 1 - LG - Form #250000072

Last Saved: 10/12/2024 5:38 PM EDT

Basic Information Service Requests

rvice Requests Technical Contact Information

Procurement Information FCC Form 470 Review

Certifications & Signature

Please complete the certifications below.

Applicant Certifications

✓ I certify that the applicant includes schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801 (18) and (38), that do not operate as for-profit businesses, and do not have endowments exceeding \$50 million.

Other Certifications

- ✓ I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders submitted will be carefully considered and the bid selected will be for the most cost-effective service o educational needs and technology goals.
- I certify that I will retain required documents for a period of at least 10 years (or whatever retention pe funding year or the service delivery deadline for the associated funding request. I certify that I will reta for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that I m
- I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding requiform may be punished by fine or fortesture, and the becommunications Act, 47 U.S.C. \$5 502, 503(b), or
- I acknowledge that FCC rules provide that persons who have been convicted of criminal violations of subject to suspension and debarment from the program.
- ✓ I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be used for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 54. promise of anything of value, other than services and equipment sought by means of this form, from to the commission of this form, from the commission of th

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

Y

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.

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 th 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 25 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 yo 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 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 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 you 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 dat 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 SEI D COMPLETED WORKSHEETS TO THESE ADDRESSES.

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

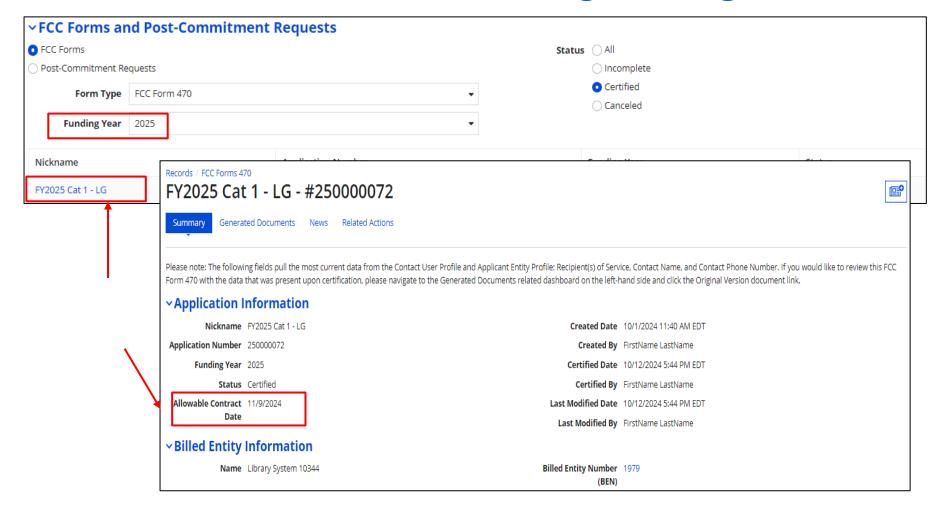
Certifying

Form

CERTIFY

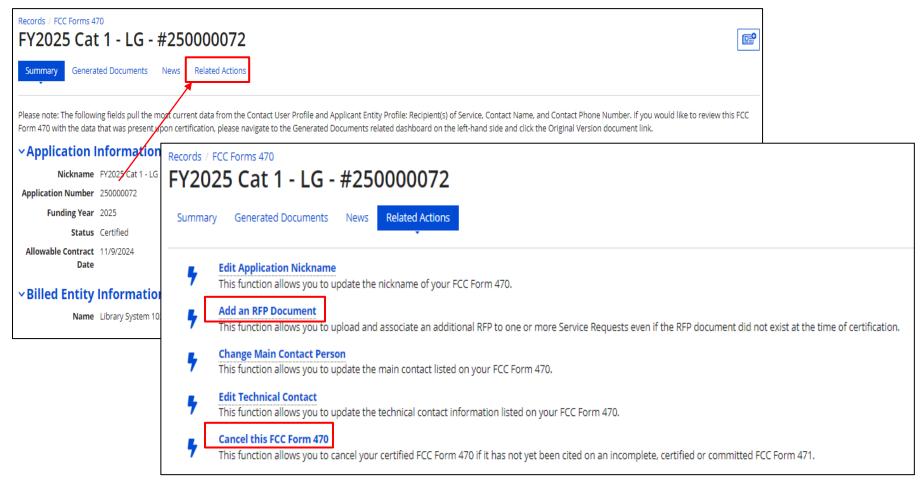


Viewing/Editing Form 470



To find the Form 470, go to the bottom of the Landing Page, and search. Click on the Nickname to see a summary of the application. This will also show you your "Allowable Contract Date". Contracts can be awarded on or after this date.

Viewing/Editing Form 470



Click on "Related Actions" for a list of options for corrections/changes. The two highlighted in red above are the new items.

Remember, if you make a "cardinal change" (such as adding new service or quantities), your 28-day waiting period will restart.

Bid Evaluation Sample

 Evaluate your bids using a matrix with your bid factors and points.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the ELIGIBLE products and services	50	20	50	40
Prior experience w/vendor	20	20	0	20
Product compatible with existing infrastructure	15	10	5	15
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10
Local or in-state vendor	5	5	0	5
TOTAL	100	55	65	(90)

 Be sure to date and add a statement such as "based on the above criteria, we have chosen Vendor 3".

Bid Matrix Evaluation Category 1

Insert Insert Insert **Points** Name of Name of Name of Factor **Available** Vendor Vendor Vendor Price of the ELIGIBLE goods 70 and services Prior experience w/ vendor 20 Prices for ineligible services, 10 products & fees Total 100

Based on the above bid matrix criteria, we have chosen **Insert Vendor Name** as the service provider for **Insert Service Type**.

Name: _____

Signature:

Date: _____

Bid Evaluation Letter

For a template of my sample letter, go to my "Resource Library" page at https://www.ohio-k12.help/e-rate-support/resource-library/.



That's the Form 470 in a nutshell!

Any questions?

Where to Go for E-Rate Help

- USAC's Client Service Center (CSC)
 - E-Rate "Help Desk" where applicant & service providers can get answers to questions
 - Call 888-203-8100
 - Submit a 'Customer Service Case' in EPC



E-Rate Coordinator

- E-mail Lorrie Germann at <u>lorrie.germann@education.ohio.gov</u>
- Call: 740-253-1153
- Attend webinars!
- https://www.ohio-k12.help/E-Rate-support (Note new URL!!)
- Subscribe/read listserve messages! (If you've had issues receiving my emails, please subscribe again!!)
- Helpful Documents: https://www.ohio-k12.help/E-Rate-support/resource-library/
- Training: https://www.ohio-k12.help/E-Rate-support/E-Rate-events/