Education SUPERHIGHWAY

E-rate Form 470 Checklist

A step-by-step guide for filing your 470. Use the reference links for in-depth information and resources.

The information presented below is meant to act as a guideline for your 470 process. It is based on information presented by USAC, but it is not a resource directly created or distributed by USAC. **The specific deadlines and requirements for your services may vary. Refer to the linked USAC pages to learn more.**

STEP	TIMING
GET SET UP ▶ Make sure you have your username and password to the E-rate Productivity Center (EPC), application management portal for the E-rate Program. ▶ If you forgot your login information, contact USAC's helpline at **(888) 203-8100**.	**July-September**
1 LOG INTO EPC ▶ Update all district and school(s) information. ▶ Link any E-rate consultants that will be helping you, or consortia to which you are subscribed in EPC.	**July-September**
2 DETERMINE NEEDED SERVICES AND EQUIPMENT ▶ Work with your IT staff and advisers to determine what Category 1 and 2 services and equipment you will need to procure in the coming E-rate cycle. ▶ Review the Eligible Services List on the USAC website to confirm services and equipment for which you may request discounts.	**July-September**
3 DEVELOP YOUR PROCUREMENT MATERIALS ▶ If you are pursuing any Category 1 upgrades or new services, a **Request For Proposal** can be written to accompany your Form 470. ▶ Draft your Form 470 using EducationSuperHighway's templates and guidance. The 'Narrative' language for your Form 470 should be perfectly aligned with your Form 470. ▶ If you are not pursuing an upgrade, or are filing for a very basic Category 2 equipment list (i.e. no cabling or construction), you may choose to skip the RFP and just file a Form 470.	**September**
4 CONSTRUCT YOUR BID EVALUATION MATRIX ▶ **Remember - Price of eligible services and equipment must be the most heavily weighted factor.** ▶ Determine your bid evaluation team. Ideally 3 or more people, for example your IT director, your Business Manager and a principal or superintendent.	**September-October**

!   EXTRA TIPS
▶ **Determine a date before which vendors may submit questions** about your project, especially if requesting a large or complex project (special construction for Category 1 services; cabling and infrastructure for Category 2).
   • Usually two weeks from the date on which the 470 is filed is sufficient. (This will limit solicitation calls.)
▶ **Calculate the length of your bidding window** (i.e. how long vendors will have from the time the Form 470 is posted until you stop accepting bids).
   • This window must be at least 28 calendar days (either from the date the Form 470 is filed or from the date on which you filed your final addendum to your RFP), but you should make it longer to give vendors adequate time to review the materials and craft a quality response.
   We suggest 40-60 days.
▶ **Remember:** The winning vendor must be selected and a contract must be signed prior to filing the Form 471.
	September-October

MILESTONE 1 - YOU'RE READY TO FILE YOUR FORM 470

	STEP	TIMING

5 ☐ **FILE YOUR FORM 470/RFP**
- ▶ Have a PDF copy of your RFP ready to upload.
- ▶ Make sure to select the proper items from the Services Requested drop-down menus.
- ▶ When filing for data transmission services (i.e. fiber optic Internet Access or WAN circuits), anticipate future need and put a large number in the "maximum bandwidth requested" field.

October-December

6 ☐ **RESPOND TO VENDOR QUESTIONS**
- ▶ Only accept questions from vendors in writing.
- ▶ Only answer the questions asked; do not volunteer new information unless you need to correct an error in your original filing.
- ▶ Once the deadline for submitting questions has passed, put all vendor questions and your responses in a single document and upload it as an addendum to your 470/RFP.
- ▶ Share responses with ALL vendors who either asked a question or have expressed interest in the project(s).
- ▶ Save ALL documentation and correspondence.

November-January

7 ☐ **EVALUATE BIDS**
- ▶ Once the bidding window has closed, evaluate all bids based on the bid evaluation matrix/criteria developed earlier.
- ▶ Have each member of your evaluation committee complete a bid matrix/scoresheet and determine the average overall scores of each respondent.
- ▶ Keep in mind that you must select the most cost-effective solution; do not change your criteria and evaluate all responses on a level playing field.
- ▶ If you receive zero or one response, you may solicit additional bids from known vendors.

December-February

MILESTONE 2 - PREPARE TO FILE YOUR 471

8 ☐ **CONTRACT NEGOTIATIONS**
- ▶ Notify the winning vendor(s) and request the contract(s) from them.
- ▶ Make sure that contracts:
  - • Align with the requirements set forth in the 470/RFP
  - • **Include a clause that allows termination if E-rate funds are not approved**
  - • Allows upgrades to bandwidth during the life of the contract
  - • Not more than five years in length

January-March

REFERENCES - Tips, resources, and additional links for steps 1-4

STEP 1 USAC Trainings and Outreach
EducationSuperHighway E-rate 101 Webinar

STEP 2 EducationSuperHighway Complete Category 1 Webinar
EducationSuperHighway Category 2: Masterclass series 1, Masterclass series 2, Masterclass series 3
EducationSuperHighway - Determining if a connection is Category 1 or Category 2
EducationSuperHighway - Internal Network Guidance

STEP 3 EducationSuperHighway - Form 470 Best Practices
EducationSuperHighway - RFP Templates and Guidance

STEP 4 USAC Sample Bid Evaluation Matrix