



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee
From: Gilda Herrera
Date: 6/21/2023
Re: E-RATE ONLINE LLC

Answer all questions and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information			
Vendor Name:	E-RATE ONLINE LLC		
Doing Business as: (DBA)			
Vendor Address:	200 Boston Post Road Suite 11, Orange CT 06477		
Vendor Contact Name:	Marybeth Sagnella		
Vendor Contact Email:	msagnella@erateportal.com		
Is the contractor a minority or women owned small business?			No
Agreement/Contract Information			
New or Renewal Agreement/Contract?		Renewal Option 4 of 5	
Effective Dates: (mm/dd/yy) <small>Multi-yrs. require Board of Aldermen approval</small>	From	July1, 2023	To June 30, 2024
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$40,000		
Funding Source Name: Acct. #:	19047200-56694 other Contractual Services		
Contract #: <small>(Local or State)</small>			



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Key Questions:

1. What specific service will the contractor provide:

1. E-rate Consulting Services RFP# 2020-05-1286, Yearly E-Rate Form 470 and 471 application processing and consulting services to secure federal E-Rate funding for Network refresh and internet service discounts. See attached copy of original Contract and RFP response.

2. How was the contractor selected? **Attach appropriate supporting documents*

☒ **Quotes see attached**

☐ **Sealed Bid #** _____

☐ **Sole Source #** _____

☒ **RFP# 2020-05-1286**

☐ **State Contract #** _____

☐ **Exempt Professional**

- ☐ Accountant
- ☐ Actuary
- ☐ Appraiser
- ☐ Architect
- ☐ Artist
- ☐ Dentist
- ☐ Engineer
- ☐ Expert Professional Consultant
- ☐ Land Surveyor
- ☐ Lawyer
- ☐ Physician/Medical Doctor

3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:

a. Please explain how the vendor was chosen? **Attach Vendor Proposal*

May 23, 2019-RFP# 2020-05-1286

b. Who were the members of the selection committee? *(Minimum 3 members required)*

IT Director, IT Staff person,
Purchasing Dept.

Key Questions: - Continued



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4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?
Yes
5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much? <small>*Attach Renewal Letters</small>
N/A
6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?
N/A
7. Is this a service that existing staff could provide? Why or why not?
No.

Agreement/Contract Processing Checklist



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To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.

Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement_Contract_Checklist\2022-2023

1. Has this vendor performed service(s) in prior fiscal years?	
If Yes,	Vendor # 46194
If No or New,	Vendor must provide completed W9
2. A quote or proposal submitting regarding the agreement/contract.	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u> It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor must match rider specifications outlined. Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite
Rider 355	Professional Services – Cyber – Offsite
4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.	
Emailed Disclosures are acceptable.	



200 Boston Post Rd. Suite 11
Orange, CT 06477

Invoice

Date	Invoice #
7/1/2023	9114

Bill To

New Haven - Board of Education
Attn: Accounts Payable
54 Meadow Street
New Haven, CT 06519

Tax ID#:	P.O. No.	Terms	Project
52-2368053		Net 30	

Quantity	Description	Rate	Amount
1	NEW HAVEN BOE - USF PROGRAM: USF FILING SERVICES - 2023-24 TERMS: JULY 1, 2023 - JUNE 30, 2024 Services provided per Service Level Agreement	40,000.00	40,000.00

Total	\$40,000.00
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Make all checks payable to: E-RATE ONLINE, LLC

When you provide a check as payment, you authorize ERO to either use the information on your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction.

If you have any questions regarding this invoice, please contact us at 203.445.9577 Ext. 108

Thank you for your business.



July 1, 2023

NEW HAVEN PUBLIC SCHOOLS
54 MEADOW STREET, 5TH FLOOR
NEW HAVEN, CT 06519

RE: SERVICE LEVEL AGREEMENT FOR E-RATE FILING SERVICES

E-RATE ONLINE, LLC (ERO) maintains a solid base of E-Rate clients throughout the country, securing over **\$400,000,000** in reimbursements since the program began in 1997. ERO offers the following services to assist the **NEW HAVEN PUBLIC SCHOOLS** (*"the Client" or "Client"*) with their E-Rate filing responsibilities.

- 1) USF Organization & Account Setup:** ERO will work with the Client's business and technology services staff to develop a comprehensive system of compiling, organizing, tracking and submitting information relative to the E-Rate program. Upon written authorization to proceed, ERO will perform a series of activities to setup the Client's account in our online management system (**EROS**).

For each active funding year, an online program binder will be created which serves as the central source for all E-Rate data. This web-based binder is divided into seven sections: 1) Form 470; 2) Form 471; 3) Program Integrity Assurance; 4) Form 486; 5) Reimbursement Tracking (Forms 472, 474 & 500); 6) Correspondence and 7) Contract Fees and Invoicing.

- 2) Data Collection & Application Assembly:** ERO will distribute templates to named Client staff members to complete each E-Rate form. A dedicated *Account Manager* will be assigned exclusively to manage the Client's account and discuss the technical aspects of either template issued or the E-Rate program. ERO ensures that these templates will be completed in a timely fashion to meet program deadlines. Once each form is submitted, all relevant information is recorded and stored in EROS.

- 3) Form Submittal:** ERO's services include the filing of all applicable E-Rate forms on behalf of the Client. The following are the "major" forms included in our service offering:

- a. **Form 470:** The Form 470 describes the services and/or products the Client is seeking and includes information about the Client that service providers need to know to best meet the Client's needs.
- b. **Form 471:** The Form 471 lists the services for which the Client is requesting E-rate discounts, the entities that are eligible to receive these services, and establishes the discount rate the Client will receive on these services.
- c. **Form 486:** The Form 486, Receipt of Service Confirmation Form, is used to indicate that the Client (or the eligible entities it represents) is receiving or has received service from

the service provider(s) with which it contracted for E-rate eligible services. When the program administrator receives a properly completed Form 486, it triggers the process for the actual payment of discounts to the service providers.

- d. **Form 472:** Officially known as Form 472, the Billed Entity Applicant Reimbursement (BEAR) Form is the tool the Client may use to request reimbursement for E-rate discounts on approved services which the Client has already paid for.

4) Reimbursement and Funding Year Closeout: ERO will be responsible for tracking the Client's E-Rate funding commitments, submitting quarterly funding reports and working with the Client's service providers to ensure that reimbursements are issued in the manner they are requested.

5) E-Rate Filing Services and Fees:

- Review of prior USF funding year applications and awards
- Assist the Client with compiling all necessary information to file all applicable E-Rate forms
(note: The Client will provide information to ERO and ERO will file the applicable form or forms)
- Forms filed will cover all current and/or active Funding Years
- Responsible for Program Integrity Assurance (PIA) review process
- Reimbursement/Tracking reports and projections
- **PROJECT FEE: \$40,000.00** (PLEASE SEE EXHIBIT A FOR A LIST OF AGREEMENT TERMS)

ERO looks forward to continuing a professional relationship with the **NEW HAVEN PUBLIC SCHOOLS**. If you require any additional information not included in the above detail, please do not hesitate to contact our offices.

SINCERELY,



MARY JO SAGNELLA
CHIEF OPERATIONS OFFICER
200 BOSTON POST ROAD, UNIT 11
ORANGE, CT 06477
P: (203) 445.9577
F: (203) 445.0456
msagnella@erateportal.com
msagnella@erateportal.com

SIGNATURE CONFIRMATION:

AUTHORIZED SIGNER

DATE

PRINTED NAME

TITLE

EXHIBIT A – USF AGREEMENT TERMS:

1. **Payments:** Client will be billed \$40,000 on an annual basis.
2. **Term:** This Service Level Agreement (SLA) begins on July 1, 2023 and shall continue for twelve (12) months. At the end of the initial term, this Agreement shall continue for successive twelve (12) month terms, unless either party delivers notice of termination to the other party forty-five (45) days before the end of the then current term.
3. **Late Payments:** Any balance that remains unpaid for more than forty-five (45) days after the due date shall be subject to accrue interest at the rate of 1.5 percent per month on the unpaid balance. After ninety (90) days, ERO reserves the right to discontinue E-Rate filing services until any late payment and other charges are paid in full.
4. **Fee Calculation:** The fee is calculated based on Client size and past participation in the e-rate program.
5. **Provided Services:** Services cover the application, Program Integrity Assurance (PIA) review and reimbursement phases of the E-Rate program.
6. **Constraints:** Services to file selective reviews and E-Rate program audits are not covered by this SLA.
7. **Rate Changes:** The rate shall remain fixed for as long as this Agreement is in place. However, ERO reserves the right to charge a Cost-of-Living increase of three percent (3.0%) at the start of each renewal term. In addition, if the Client's total funding reimbursement increases significantly, ERO will submit a new SLA to the client prior to the start of the next renewal term.
8. Additional service fees for technical writing and analysis (e.g. Wide Area Network specifications, new services) will be addressed on a case-by-case basis as requested.
9. **Per USAC-SLD program rules, consulting services may not begin until this Service Level Agreement and corresponding Letter of Agency is signed by the Client.**



City of New Haven

Bureau of Purchases

200 Orange Street, Room 301

New Haven, CT 06510

Tel: 203-946-8201 Fax: 203-946-8206

The City of New Haven ("City") is accepting sealed
Request for Proposals (RFP) for the following:

TITLE:

ERate Consulting- NHPS

RFP #:

2020-05-1286

Honorable Toni N. Harp

Mayor

Michael V. Fumiatti, Sr

Purchasing Agent

Responses must be submitted in the form and manner specified in this request. Solicitation details are outlined in the **Project Summary**.

Forms and specifications may be obtained and your digital submission through the Bureau of Purchases, website:

<https://newhavenct.bonfirehub.com/portal/?>

City of New Haven
Bureau of Purchases
200 Orange Street, Room 301
New Haven, CT 06510



City of New Haven
Bureau of Purchases
200 Orange Street Rm 301
New Haven, CT 06510

<https://www.newhavenct.gov/gov/depts/purchasing/default.htm>

Telephone: (203) 946-8201 Fax: (203) 946-8206

RFP Summary

Responses must be submitted in the form and manner specified in this request

Request for Proposal:	ERate Consulting- NHPS			
Solicitation #:	2020-05-1286			
Solicitation/Advertise Date:	May 5, 2019			
RFP Closing Date:	May 28, 2019	RFP Opening Time:	11:00	AM
Pre-RFP Meeting Date:	N/A	Pre-Bid Meeting Time:		
Pre-RFP Meeting Location:	N/A			
Department:	NHPS-IT			
Contract Term:	One year with	1	Renewals	4
Projection Description:	Assist with preparation of district technology plan. Assist with pushing plan through CT state Education department for state approval and coordinating submission of plan through SLD as needed.			
Insurance Requirements:	Refer to Rider	A	(This Rider is attached)	
Local Preference:	Yes			
Pricing Sheet:	Yes			

Specifications

REQUEST FOR PROPOSALS

Brief Overview of Project:

This project will address the need of the New Haven Public School (NHPS) system to select a consultancy firm to help coordinate and manage the ERATE program for the district. The term of the contract will be for 1 year (July 1, 2019 – June 30, 2020) with the option to renew 4 times. Interested vendors must respond to the requirements of this RFP and provide a price quote for 1 year of services and 4 separate renewals. The winning vendor will be paid in 2 equal installments during the budget year.

General Requirements for Respondents:

1. Assist with preparation of district technology plan. Assist with pushing plan through CT state Education department for state approval and coordinating submission of plan through SLD as needed.
2. Support the NHPS in all phases of the ERATE application and monitoring process.
3. Review district compliance with SLD requirements including CIPA (Children's Internet Protection Act).
4. Assist in development of district Request for Proposals (RFP) for services eligible for ERATE discount and timing of postings of RFPs to New Haven City Web site to meet ERATE compliance.
5. Prepare and submit district's Form 470-Description of Services Requested.
6. Coordinate and participate, from the ERATE compliance perspective, in the evaluation of bids from service providers. Provide NHPS IT Manager/designated NHPS officials with compliance information for use in the decision making process.
7. Assist with discount percentage determination including alternative discount mechanisms. This includes assistance with coordinating the ERATE free and reduced lunch survey and discount percentage process. Examples of work include: verifying survey form format is valid, verifying that collection/counting process meets SLD guidelines, and combining ERATE survey data with other valid data types to produce final percentage eligible report by school site.
8. Prepare and submit district's Form 471-Services Ordered. And provide a timetable of events that reflects key dates when information is needed, forms completed and submitted from first form to SLD through receipt of SLD approvals.
9. Ensure Forms 470 and 471 are properly submitted within filing window and certified.
10. Review Receipt Acknowledgement Letter for accuracy and submit corrections to SLD as needed.
11. Communicate with SLD Program Integrity Assurance personnel as needed to ensure reviewers receive an accurate and timely response.
12. Review Funding Commitment Decision Letter (FCDL) for accuracy. Prepare and submit appeal letters as needed.
13. Prepare and submit Forms 486, 472 and 500 as necessary for collection of ERATE discounts on behalf of the district.
14. Prepare and submit appeal letters, Service Provider Identification Number (SPIN) change requests, service substitutions, change of invoicing mode, contact change letters, and other requests as needed to maximize district's ERATE discounts.

15. Represent district through all phases of an on-site audit or Bearing Point site visit.
16. Help track billing and payments for all ERATE vendors that have won RFPs and are doing ERATE project related work for the NHPS. If the selected vendor is not an incumbent they must insure that the transition process from the existing ERATE consultancy firm is seamless with no ERATE service issues. Identify ways new vendor would review current filings already submitted and comment on any ways they should be changed and why.
17. Successfully keep records on all aspects of the NHPS ERATE program.
18. Completely understand and correctly apply, when working with or on behalf of NHPS, CT state/municipality procurement policies. This includes both New Haven procurement policy and the CT state procurement policies generally applied to its municipalities.
 - The proper application of Tariff designation as defined by CT and the Federal government for service requests is a requirement.
19. As needed participate in monthly meetings to discuss the status of the NHPS ERATE program with: COO, IT Manager, or/and other NHPS officials and consultants.
20. As needed participate as decision committee members, to validate ERATE Compliance, for ERATE RFPs.
21. Provide guidance to and cooperate with NHPS officials or their designees in regards to all aspects of the ERATE program. The selected firm will in fact be the ERATE expert for the NHPS.
22. All respondents must provide a staff roster with credentials and a list of current customer references.
23. As needed provide guidance to the School Construction Office in regards to ERATE eligibility for technology designs used at schools under construction.
24. The winning vendor must indicate any percentage of cost increases that could result if they are renewed at the end of the term.

RFP Purpose: Selection of a Consultancy firm to provide services to manage the ERATE program for the New Haven Public School district.

RFP Review Criteria & scoring method:

1. **(25) Price:** Overall total cost of submitted solution. Overall cost is determined as a total for the entire life of the contract. **Scoring Process:** RFP responses will receive points as follows -
 - a. 25 Points = Lowest overall cost
 - b. 1-24 Points = Middle range for cost
 - c. 0 Points = Highest overall cost
2. **(20) Quality of Service:** Based on both Customer References and any NHPS experience. **Scoring Process:** Committee will be looking for overall: Success in increasing the level of ERATE funding for districts, success in winning denial of funding challenges, success in completing submissions on a timely basis, success in adding new areas for E-rate funding not previously recognized, longevity of current client relationships, success with resolving bearing point visits or/and audit situations, and overall quality of customer service. –
 - a. 15 – 20 Points = Exceptional
 - b. 5 – 14 Points = Acceptable
 - c. 0 – 4 Points = Unacceptable
3. **(20) Personnel Qualifications:** ERATE related and professional qualifications of Vendor staff that will be involved with this project. **Scoring Process:** RFP responses will receive points as follows –
 - a. 15 Points = Staff of 7 or more, 1 or more Certified Public Accountants, 1 or more Attorneys on staff. Staff members have an average of 7 or more years experience working with the ERATE program.
 - b. 10 – 14 Points = Staff of 5 or more, 1 or more Certified Public Accountants or Attorneys. Staff members have an average of 5 or more years experience working with the ERATE program.
 - c. 5 – 9 Points = Staff of 4. Staff members have an average of 4 or more years experience working with the ERATE program.

- d. 0 – 4 Points = Staff of at least 3. Staff has an average of 4 or more years experience working with the ERATE program.

4. (15) Prior Experience: Amount of total experience in years that the vendor has in providing ERATE Consultancy Services for school districts. **Scoring Process:** RFP responses will receive points as follows

–

- 15 Points = 7 or more years experience with districts that have 10,000 or more students.
- 10 – 14 Points = 5 or more years experience with districts that have 7,000 or more students.
- 5 – 9 Points = 3 or more years experience with districts that have 4000 or more students.
- 0 – 4 Points = 1 or more years of experience with districts that have 4000 or more students.

5. (10) Proximity: Physical location of vendor offices and distance from New Haven BoE Offices at 54 Meadow Street. **Scoring Process:** RFP responses will receive points as follows -

- 10 Points = Less than 24 miles, full points for vendors located in New Haven
- 1 – 9 Points = 25 or more miles
- 0 Points = 50 or more miles

6. (10) Responsiveness to RFP: How well the vendor responded to and in their response met the requirements of the RFP and the scope of the project outlined in the RFP. **Scoring Process:** RFP responses will receive points as follows –

- 7 – 10 Points = Fully Responsive
- 4 – 6 Points = Responsive
- 1 – 3 Points = Less Responsive