



# QUESTEQ

EDUCATIONAL TECHNOLOGY MANAGEMENT

## **Crawford Central School District**

**Category 1 and Category 2 E-Rate**

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[www.questeq.com](http://www.questeq.com)

## QUESTEQ SERVICES VALUE

- ✓ QUESTEQ core E-rate team has provided strategic E-rate and technology planning services to traditional public, private, cyber, charter and alternative schools since the inception of the program. We help our clients to define, plan, implement and fund their technology goals within and outside of the E-rate program.
- ✓ QUESTEQ core E-rate team has the expertise to evaluate client education goals and initiatives by assessing the technology requirements that are needed to support them. Our assessment capabilities cover all technology areas including: network infrastructure, data centers, voice and data telecommunications, IT security, business systems and software, educational technology, and policies/procedures.
- ✓ QUESTEQ is not just an E-rate filer, we are strategic planners. Our deep knowledge and experience has helped our high growth clients to expand their education footprint while addressing their technology needs in alignment with E-rate rules and funding opportunities both in and outside of the program.
- ✓ QUESTEQ guarantees that our E-rate Application process follows USAC/SLD rules and can pass a program audit should one occur. We include many safeguards within our Application process that reduce and/or eliminate scrutiny during PIA reviews.
- ✓ QUESTEQ competitive bidding procedures and Bid Opportunities tool ensures a proactive, fair and open environment for interested service providers to respond to client E-rate RFPs and provides built-in safe-guards for the district to minimize risks.
- ✓ QUESTEQ provides secure, online document retention for our client Application materials. Application documentation is accessible to clients using a secure login and password. Clients are able to access and download their E-rate Application materials, as well as upload any Post Application and Post Funding related files at their discretion if they wish to keep everything in one safe place.
- ✓ QUESTEQ always represents the best interests of our clients at the FCC, USAC/SLD and state department of education levels in relationship to the E-rate program or with matters that might impact our clients E-rate needs.
- ✓ QUESTEQ continuously improves upon our knowledge and skills through ongoing training, participation in peer to peer groups and through memberships to leading industry advocacy organizations and publications.

## SCOPE AND DELIVERABLES

### Category 1

QUESTEQ will dedicate executive level analysts and support resources to research, identify and align existing contracts, processes, procedures and needs with the current E-rate 2.0 program guidelines and requirements. Additionally, QUESTEQ will collaborate with Crawford Central School District staff to help evaluate and create potential funding opportunities relevant to technology needs as they align with educational technology plans and initiatives. This proposal covers turn-key consulting services for one E-rate funding year. The scope of work for applications filed by QUESTEQ are comprised of several processes which are outlined below.

1. Identification, strategic guidance and acquisition to support each of the services listed where pricing is based on either a competitive bid process or Month to Month quotes
  - a) Local and Long Distance Voice Services
  - b) POTS Services
  - c) Cellular Voice Services
  - d) WAN and Internet Services
2. Posting of Category 1 Form 470 Application(s) to support each of the preceding services for RFP(s), Month-to-Month and/or Annual quote processes.
3. Coordination of the required advertising and management of participant responses of all respondent proposals and corresponding award recommendation reports for the RFP posted. This will include aggressive solicitation of eligible service providers to ensure competition and competitive pricing beneficial to the District
4. Apply for any eligible continual equipment and site-based maintenance opportunities if applicable
5. Generation of Notice of Award letters to successful Respondents and corresponding contractual/e-rate structuring of contract agreements where required.
6. Generation of custom SLD Form 471 Application(s) and any corresponding support documentation/attachments for each service request.
7. Assist CCSD with process to obtain accurate F&R lunch eligibility data to better leverage E-Rate and other programs reliant on this data as necessary. This will include structuring of all required support documentation to validate processes for PIA reviews.
8. Submit Category 1 E-Rate application(s) to SLD.
9. Support customer's interests relevant to subsequent SLD reviews of funding requests. Includes proactive collection and staging of data needed for anticipated PIA Review requests.
10. Provide access to application summary report and secured/off-site on-line documentation of relevant processes including defining Customer's "fair-share" costs, and added technology value to the Customer.
11. Provide E-rate Application Summary Report, Next Steps Narrative and all Application level documentation which describes CCSD's "fair-share" costs, and added technology value.

12. Facilitate and establish with all service providers the set-up of preferred invoicing options and work with internal or external resources to set-up procedures that facilitate timely funding discounts or reimbursements for all E-rate related expenditures.
13. QUESTEQ shall include post-application support resources for the district's Form 471 submitted for E-rate funding year 2020-2021. QUESTEQ does not assume responsibility for the application content but agrees to provide support as best it can. These post-application services are comprised of several processes which are outlined below.
  - Provide post-application program form support to meet program compliance. These may include funding acceptance, vendor changes and cancellations as needed.
  - Facilitate and establish with application service providers the set-up of preferred invoicing options and work with internal or external resources to set-up procedures that facilitate timely funding discounts or reimbursements for all E-rate related expenditures.

## Category 2

QUESTEQ will dedicate executive level analysts and support resources to research, identify and align existing contracts, processes, procedures and needs with the current E-rate 2.0 program guidelines and requirements. Additionally, QUESTEQ will collaborate with Crawford Central School District staff to help evaluate and create potential funding opportunities relevant to technology needs as they align with educational technology plans and initiatives. This proposal covers turn-key consulting services for one E-rate funding year for any/all sites identified by CCSD participating within this E-Rate application process. The scope of work is comprised of several processes which are outlined below.

Discovery and coordination processes to address the specific eligible equipment and services available to CCSD within the E-rate 2.0 mandates for network cabling, networking and wireless equipment, installation/configuration, hardware maintenance needs relevant to all school buildings for which funding opportunities exist.

1. Interview district staff, administration and/or external technical support resource(s) to identify additional eligible hardware and cabling needs or modifications. This will include site visit(s) as needed.
2. Discovery and coordination processes to address entity's E-rate eligible hardware acquisition processes including gathering of quotes and composing all required supporting documentation and attachments. This will also include all e-rate processes required to stage for possible installation and maintenance at significantly reduced costs.
  - a. Wireless Access Points, Controllers
  - b. Network Switches and Racks
  - c. UPS
  - d. Firewall
  - e. Cabling
3. Construction of a strategic RFP Contracts for eligible network equipment and cabling services agreement that will provide for identified drops to support the Customer's technology needs (by site). RFP Contracts will dictate documentation, standards, testing and labeling deliverables. RFP Contracts will be structured to allow for leveraging of E-rate program funding at the District's discretion if awarded funding.
4. Detail hardware and cabling requests via hard and/or electronic copy for availability to contractors.
5. Posting of SLD Form 470 Application to support contractor service bid processes.
6. Coordination of the required advertising and management of participant responses up to and including official public opening of all respondent proposals and corresponding award recommendation report for RFP posted. This includes Notice of Award letter to successful Respondent and corresponding contractual/e-rate structuring of contract agreement.
7. Generation of custom SLD Form 471 Application(s) and any corresponding support documentation/attachments for service contract(s).
8. Submit Category 2 E-Rate application(s) to SLD.
9. Support customer's interests relevant to subsequent SLD reviews of funding requests. Includes proactive collection and staging of data needed for anticipated PIA Review requests.

10. Provide access to application summary report and secured/off-site on-line documentation of relevant processes including defining Customer's "fair-share" costs, and added technology value to the Customer.
11. Facilitate and establish with all service providers the set-up of preferred invoicing options and work with internal or external resources to set-up procedures that facilitate timely funding discounts or reimbursements for all E-rate related expenditures.
12. Assist with project coordination regarding the acquisition of funded equipment, coordination with funded installation contractors, and/or managing the implementation of new services.

**C1 & C2 Post Application Processes:**

- Support customer's interests relevant to subsequent SLD PIA reviews of funding requests. Includes proactive collection and staging of data needed for anticipated PIA Review requests.
- Review all Receipt Acknowledgement Letters (RALs), submit any ministerial and clerical errors, and retain documentation
- Facilitate and correspond concerning any cost effectiveness reviews in support of funding requests
- Lead all efforts with USAC/SLD in supporting/defending all funding requests

**C1 & C2 Post Funding Awards:**

- Upon receipt of Funding Commitment Decision Letters (FCDLs), review and file the following; 486s and any USAC and FCC Appeals (IF applicable)
- Evaluate funding awards to determine if any service substitutions, SPIN changes, corrections or cancellations are needed, then file and document
- Work with internal or external AP/AR team to set-up procedures that facilitate timely funding discounts or reimbursements for all E-rate related expenditures
- Provide access to application summary report and secured/off-site on-line documentation of relevant processes including defining Customer's "fair-share" costs, and added technology value to the Customer.
- Provide E-rate Application Summary Report, Next Steps Narrative and all Application level documentation which describes School Name's "fair-share" costs, and added technology value
- Facilitate and establish with all service providers the set-up of preferred invoicing options (SPI or BEAR) and work with internal or external resources to set-up procedures that facilitate timely funding discounts or reimbursements for all E-rate related expenditures
- Review previous C2 funding commitments with the school and submit corresponding forms to ensure the unused funds (if applicable) are returned to the program for the school's future use

### **C1 & C2 Funds/Program Management:**

- Schedule and facilitate E-rate conference calls with stakeholders where Crawford Central School District is adding/changing service providers and doing Category Two projects in new schools/E-rate year; Following the call/s, disseminate notes that include service provider contact information relevant to projects
- Facilitate any E-rate webinars on Post Application and Post Funding Award procedures
- Prepare Funds Disbursed to Date Reports as well as conduct quarterly status check on BEAR/SPI set-up, BEAR approval status as needed. Review and communicate relevant information with BLPCS; Retain documentation in myratedocs.com
- Communicate to Crawford Central School District all relevant, ongoing USAC/E-rate information pertaining to reviews, awards, funding management/reports, program updates, changes, which can affect them
- Identify any contract, funding or invoicing extension requests that are needed for the funding year, file and retain documentation
- Represent the best interests of Crawford Central School District at USAC/SLD and FCC

### **SERVICES NOT INCLUDED:**

1. Site Based E-rate Program Audits\*
2. E-rate Program Select Review\*\*
3. Any other non-site E-rate program based audits

\* Support for these items can be addressed through the block of time from QUESTEQ provided in this proposal

\*\* Please be advised that the E-rate process contains several preparation/discovery exercises, applications and review processes. The "Select Review" in particular entails a significant amount of additional, in-depth reviewing and reporting procedures. "Select Reviews" are initiated randomly. If selected an applicant has only 15 days to respond in full to the SLD requests for detailed support documentation, narratives, equipment specifications, and other relevant components that substantiate the applicant's E-rate funding requests. The "Select Review" support is not included in this proposal. If the CCSD is randomly selected for "Select Review" and chooses to have QUESTEQ handle these procedures, there will be additional charges levied to address the substantial amount of time and resources required to complete the mandated requirements of the "Select Review". The "Select Review" service fee is based upon a fixed 15% of the proposal/contract value.

## CLIENT EXPECTATIONS AND RESPONSIBILITIES

1. The client is aware that QUESTEQ provides strategic E-rate consulting services to assist schools with obtaining E-rate funding for eligible services and makes no claim implied or written that an Application/form filing process for E-rate funding constitutes or is a guarantee of program award. Additionally, it should also be noted that QUESTEQ makes no guarantee of when funding will become available to the school as the program has no built-in mechanism for projecting or scheduling receipt of funding, given that all Applications/forms filed on behalf of an entity are subject to all current and/or future USAC E-rate approval processes.
2. The Client is responsible for ensuring that they are CIPA compliant including the education of all students on internet safety; please visit the following link for more information on compliance, <https://www.usac.org/sl/applicants/step05/cipa.aspx>
3. The Client agrees to abide by all of USAC/SLDs "Gifting" rules which are addressed in the PowerPoint that can be viewed at the following link, <https://www.usac.org/sl/applicants/step01/gift-rules.aspx>
4. The client agrees that it will review, understand and comply with all USAC/E-rate program rules including documentation and record retention by visiting the following resource links:
  - a. Audits and Assessments
  - b. <https://www.usac.org/sl/applicants/step04/default.aspx>
  - c. Document Retention
  - d. <https://www.usac.org/sl/tools/document-retention.aspx>
5. The client is expected to respond to communications and/or information, material requests from QUESTEQ team members in a timely fashion (the E-rate process involves several deadlines that cannot be missed without jeopardizing Applications and funding requests).
6. The client is responsible for ensuring that they provide accurate information/data and support materials (i.e. copies of invoices, Free & Reduced Lunch forms/Applications) regarding its school(s) financial eligibility and the correct status of existing contracts with telecommunication service providers (i.e. landline voice, wireless and Internet service providers).
7. The client is responsible in all ways to ensure that all E-Rate related public bids are advertised in accordance with state bidding mandates and guidelines.
8. The client is responsible for informing QUESTEQ immediately in writing any changes regarding information, data, supporting materials or elimination/expansion/addition to/of any initiative that could impact their funding requests or scope of work agreed upon between QUESTEQ and the client.
9. The client must identify an authorized representative of the school(s) to sign all mandatory E-rate documentation that is submitted in support of the school(s) funding requests/Applications. This representative needs to be available at short notice to sign time sensitive documents.
10. The client is responsible for identifying and making readily available any/all required school or third-party resources that must be included in the decision making/authorization processes (i.e. Board Members, CEOs, CTOs, Attorneys, etc.).



11. The client is responsible for ensuring that their internal or outsourced AP/AR personnel coordinate with QUESTEQ upon award of funding for the following:
  - a) Set-up of discounted billing for telecommunication services and/or equipment acquisition
  - b) Establish re-imbursement processes to recover E-rate related expenditures that were incurred prior to award
  
12. The client is responsible for ensuring that their internal or outsourced IT personnel coordinate with QUESTEQ upon award of funding the following:
  - a) Coordination, acquisition and implementation of E-rate related equipment
  - b) Coordination, acquisition, continuation or implementation telecommunication services
  - c) Coordination, acquisition, implementation of infrastructure build-out (cabling, etc.) and equipment installation (i.e. network closets)
  
13. By electing QUESTEQ to perform this proposed scope of work, CCSD has agreed that no representative of CCSD will willfully engage in private negotiations/conversations with prospective or awarded Service Providers/Vendors relevant to the “competitive bidding” and “award” process. Competitive bidding or bid award issues that need to be discussed must be directed to QUESTEQ. QUESTEQ follows stringent procedures for competitive bidding/award that adhere to USAC/SLD guidelines. All competitive bidding and bid award information is documented in the event an audit or review is conducted at a later date. CCSD will have the opportunity to correspond with the awarded Service Providers/Vendors after contracts have been agreed upon by all parties.

Please forward all correspondence using email: [eratesupport@questeq.com](mailto:eratesupport@questeq.com)

ERATE CONSULTANT REGISTRATION #16061996

## SERVICES AND PAYMENT TERMS

### **Fund Year 2020-2021 E-Rate Service: \$6,595**

Covers turn-key consulting services **FOR ONE** E-rate funding year (2020-2021) for C1 & C2 services. (Please note these consulting services may actually span more than one calendar year due to program processes and timelines).

Payment for these services will be as follows: One half (1/2) to be paid upon acceptance of this Proposal by the District. The balance (1/2) will be paid upon receipt of the Funding Commitment Decision Letter (FCDL) issued by the program on behalf of the District.

These services are included within the SOW at no additional costs.

1. Any eligible C1 requests (outside of internet/wan from IU) for voice and secondary internet service (outside of IU).
2. Voice RFP if you choose to go that direction during the contract term.
3. Additionally, if the program revises the voice eligibility, the SOW includes this scenario at no additional costs.
4. Due to the real-time dynamics of the E-Rate Program and any potential Category 2 (C2) cap calculation adjustments related to changes (Example: Raising the student population calculator from \$150/per to maybe \$200/per) would be inclusive of this SOW if/when applicable within the contract term

Questeq's service fee is based on the current E-Rate rules and is subject to change pending any modifications or alterations to the E-Rate program.

Questeq will provide a revised proposal for each consecutive fund year based on the remaining funds available to the district.

Please contact [eratesupport@questeq.com](mailto:eratesupport@questeq.com) for an updated list of Category 1 and Category 2 Pre-discount funding available for the 2020-2021 year.

**SIGNATURE PAGE**

IN WITNESS, WHEREOF, the parties have caused this scope of work to be executed by their duly authorized officers.

**Attest:** **Questeq, Inc.**

\_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_ 20\_\_

**Attest:** **Crawford Central School District**

\_\_\_\_\_  
Board Secretary

By: \_\_\_\_\_ Date: \_\_\_\_\_ 20\_\_  
Board President

Once the required documents have been received and accepted by Questeq, a counter-executed copy of this scope of work will be returned to you by mail.



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**LETTER OF AGENCY (LOA)**  
**PROVIDING E-RATE SUPPORT**

**District:** Crawford Central School District

Re: E-rate Funding Year(s):

**To whom it may concern:**

Please note that we hereby approve, confirm and authorize that our Educational Technology Management partner Questeq, Inc. and its staff/resources are designated as our E-rate contact and custodians related to any/all E-rate applications and interaction needs. This assignment will include the following resources who will/may act on the school's behalf regarding the funding year(s) identified above:

- 1.) George Heinitsh
- 2.) Delana Murphy
- 3.) Dave Miller
- 4.) Steve Mandarino

Authorized Signature: X \_\_\_\_\_

Printed Name: X \_\_\_\_\_

Title: X \_\_\_\_\_