



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee
From: Gilda Herrera
Date: 2/7/2022
Re: ERATE Online LLC

Contractor Name: ERATE Online LLC

Contractor Address: 200 Boston Post Road Suite 11, Orange CT 06477

Is the contractor a Minority or Women Owned Small Business?

Renewal or Award of Contract/Agreement? Yes

Total Amount of Contract/Agreement and the Hourly or Service Rate \$40,000

Funding Source & Account #:190-47200-56694

Key Questions: (Please have someone ready to discuss the details of each question during the Finance & Operations meeting or this proposal might not be advanced for consideration by the full Board of Education):

- 1. What specific service will the contractor provide:** Erate Consulting Services RFP# 2020-05-1286, Yearly Erate Form 470 and 471 application processing and consulting services to secure federal erate funding for Network refresh and internet service discounts. See attached copy of original Contract and RFP response.
- 2. How was the contractor selected? Quotes? RFP? Sealed Bid or Sole Source? Please describe the selection process including other sources considered and the rationale for selecting this method of selection:** May 23, 2019-RFP# 2020-05-1286
- 3. If this is a renewal with a current vendor, has the vendor's performance been satisfactory under the existing contract or agreement?** Yes, services provided in a timely manner.
- 4. If this Contract/Agreement is a Renewal has cost increased? If yes, by how much? No**
- 5. If this Contractor is New has cost for service increased from previous years? If yes, by how much? N/A**
- 6. Is this a service existing staff could provide? Why or why not?** No, Erate Online has expertise to maximize Federal Erate funding for the district.



July 1, 2022

MS. GILDEMAR HERRERA
IT DIRECTOR
NEW HAVEN PUBLIC SCHOOLS
54 MEADOW STREET, 5TH FLOOR
NEW HAVEN, CT 06519

RE: SERVICE LEVEL AGREEMENT FOR E-RATE FILING SERVICES

MS. HERRERA:

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:** For each E-Rate form, templates will be distributed to named Client staff members for completion. A dedicated *Account Manager* will be assigned exclusively to manage the Client's account and be available to discuss the technical aspects of either templates issued or the E-Rate program in general. ERO ensures that these templates will be completed in a timely fashion to meet program deadlines. Once each form is filed, 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.

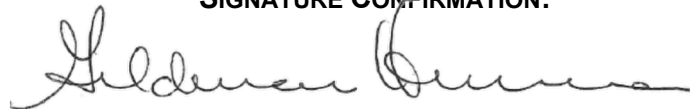
- c. **Form 486:** The Form 486, Receipt of Service Confirmation Form, is used to indicate that the Client (or the eligible entities it represents) is receiving or has received service from the service provider(s) with which it contracted for E-rate eligible services. When the program administrator receives 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,



SIGNATURE CONFIRMATION:



AUTHORIZED SIGNATURE
NEW HAVEN PUBLIC SCHOOLS

DATE

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ORANGE, CT 06477
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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, 2022 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.**