



## **PROPOSAL FOR CONSULTATIVE SERVICES**

***Infrastructure Fiber Optic Consultative Services  
&  
USF E-Rate Services: Category 1***

**Submitted To:** Kristoffer Tobbe, Chief Information Officer  
David Larson, Network Engineer  
Livingston County and Livingston ESA

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## **PURPOSE**

This proposal is submitted at the request of Kristoffer L. Tobbe, Chief Information Officer, Livingston County and David Larson, Network Engineer, Livingston ESA. It includes a detailed description of the consultative services we are offering Livingston County and Livingston ESA. We look forward to providing Livingston County and Livingston ESA with professional consulting services using total quality management principles as the foundation to ensure the success of our shared mission, which is to provide consultative support to the fiber optic project and maximize your E-Rate funding options.

## **STATEMENT OF NEED**

Livingston County has received funding for building out a county-wide fiber optic network. The scope of the project will include adding fiber optic infrastructure throughout Livingston County and include connecting all the Livingston County Public Schools within the fiber infrastructure. The project would include the use of Universal Service Fund (USF) E-Rate program to leverage an additional funding source to assist with the project.

## **SCOPE OF WORK**

Triple R Consultants will assist Livingston County with the fiber infrastructure project by providing their support and expertise in the design, development, and deployment of the countywide fiber network. Triple R Consultants will also provide Livingston ESA with strategic assistance in meeting the requirements necessary for the Universal Service Administrative Company (USAC) Schools and Library Division (SLD) E-Rate application and submittal process for E-rate Funding Year 2023 (2023/24) Category 1 discount reimbursements.

The Scope of Work includes the services detailed in the Project Implementation section of this proposal. Any additional services are made available to the district upon written request and prior approval by Triple R Consultants.

## SCOPE OF WORK TIMELINE

The services detailed in this proposal are to be performed by Triple R Consultants during the 2022/23 school year in accordance with the timelines set by the USAC/SLD for E-Rate Funding Year 2023 (2023/24) discount reimbursements. The following is a general timeline designed to meet the anticipated<sup>1</sup> dates and deadlines. Triple R Consultants will also provide support to Livingston County for the fiber optic project. The timelines for this will coincide with the E-Rate filing time. The total scope of work for Livingston County will be determined as further project discussions determined where Triple R Consultants expertise can provide support and assistance with this fiber optic project.

**July.-Oct.:** Meet with the county and school district representative to conduct survey for collecting and analyzing data to determine needs and the best options for filing Category 1 E-Rate discount reimbursements and support the countywide fiber optic project. Compile required data for E-Rate compliance and Billed Entity Numbers List for budgetary purposes. .

**Sept.-Dec.:** Review service provider documents and gather data for Category 1 Request for Proposals (RFP's) and Forms 470 processing. Assist the county and district with writing service provider RFPs to coincide with E-Rate requirements and other needs of both the county and district. Complete and electronically submit Form 470 and RFP for eligible products and services.

**Dec.-March:** Assist in the evaluation of the accepted RFP bids for compliance and adherence to specifications. Assist the county and school district with selecting service providers. Compile data and electronically complete Forms 471 for USAC/SLD processing. Complete, sign, and submit Forms 471 certification pages to the USAC/SLD. Electronically compile attachments for submitting service provider support documents to the USAC/SLD for Program Integrity Assurance (PIA) Review.

**March-June:** Follow up with the school district to identify any outstanding Form 471 applications and forms certifications required for submittal. Review RAL letters and make corrections, if necessary, Provide answers with Program Integrity Assurance (PIA) review questions and responses. Complete Forms 486 for service provider reimbursements.

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<sup>1</sup> Triple R Consultants will inform the school district of specific dates and deadlines as they become available from the Universal Service Administrative Company (USAC), Schools and Library Division (SLD).

## PROJECT IMPLEMENTATION

Here is a list of services that Triple R Consultants will carry out during the 2022/23 school year to maximize Livingston ESA' E-Rate funding options for school year 2023/24, Funding Year 2023 discount reimbursements:

### **E-Rate Program Services**

- Review demographic data and analyze statistics for developing and implementing both Category 1 E-Rate filing options.
- Determine needs and the best USAC/SLD E-Rate filing option to maximize funding requests.
- Assemble and provide the school district with an annual electronic USF E-Rate Records Book of required forms and documents. Also provide an additional documentation for the county as needed.
- Develop Category 1 RFPs to ensure E-Rate program compliance for accepting service provider bids and posting RFPs on-line.
- Review eligibility of services/products included in the bidding/funding requests.
- Provide tools for bid opening, bid evaluation, and service provider invoice tracking.
- Evaluate accepted bid documents and make recommendations for compliance.
- Verify service providers for proper FCC Universal Service Fund certification.
- Determine additional information required from service providers in response to RFPs and answer any E-rate rule related questions and other questions to service providers.
- Verify the accuracy of all E-Rate forms, documents and correspondence prior to submittal to the FCC and/or USAC/SLD.
- Electronically complete and submit Forms 470, 471, 486, 472, and 500 if needed.
- Prepare and send response to Form 471 Program Integrity Assurance (PIA) reviewers' questions and request for documentation.
- Identify the USAC/SLD E-Rate eligible and ineligible products/services to ensure correct billings and reimbursements.
- Audit service provider invoices for eligible products and services per USAC/SLD guidelines.
- Calculate reimbursable expenses and submit to vendor(s) for approval and vendor(s) signature on Form(s) 472.
- Timely file disbursement requests and, if applicable, invoice deadline extension requests.

***E-rate Program Services Cont'd***

- Track funding to ensure that each school district receives appropriate reimbursements from the selected vendors' Service Provider Invoice (SPI) and/or Form(s) 472 (BEAR).
- Assist the district with the certification process and complete required forms, as needed.
- Act as FCC and USAC/SLD documentation and correspondence liaison.
- Generate other required forms, documents and correspondence for FCC and USAC/SLD compliance; as necessary.
- Retain and maintain all of the county and school district's E-Rate records for minimum of ten years.
- Ensure the complete confidentiality of all information supplied by the county and school district.

**Fiber Optic Infrastructure Services**

- Provide consultative services to be determined after the acceptance of this proposal.

## **COMPANY PROFILE**

Triple R Consultants has a strong record of accomplishment and success with the USF E-Rate program and technology plan writing services and have established professional engagements with K-12 public, charter, and private schools in Michigan, Arizona and Illinois. During the course of the past eighteen years and on behalf of our clients, we have submitted both Category 1 and Category 2 E-Rate application requests for a total of approximately \$120 million. We work directly with each school district's staff and have a dedicated project manager who virtually becomes a member of their team to successfully navigate the E-Rate process and help them claim all the funding they are entitled to receive.

### **PRINCIPAL PROJECT MANAGER**

Robert (Bob) Rice, President of Triple R Consultants will act as the principal project manager. A veteran in the area of technology planning in education and business, Bob has been involved with the E-Rate program since its inception in 1997 and has developed technology plans for Michigan and Arizona school districts in adherence to the NCLB Act. In addition to holding a Master of Science in Career and Technical Education, he holds two Bachelor of Science degrees in Data Processing and Accounting from Ferris State University at Big Rapids, Mich. He has a total of eight years of experience as the director of technology for an intermediate school district and a local educational agency, where he was responsible for implementing a \$14 million Educational Technology Bond. He has a comprehensive understanding of educational data systems, including student accounting and finance. Previously, he implemented a district - wide ARRA technology project for delivering dynamic learning opportunities to students by enhancing classroom instruction with "state of the art" equipment, including mini laptop computers and interactive whiteboards.

As a full time consultant with Triple R Consultants, he has successfully processed E-Rate applications for a total of nearly \$120million in funding for numerous applicants in Michigan, more than \$2million to upgrade the telecommunications and data infrastructure at three Arizona charter schools, one of which was new construction, more than \$1.3million in ARRA funding for a Michigan public school district, and successfully applied for an FCC pilot program for two Michigan school districts who were selected to receive more than \$500,000.00 for 2011/12 off-premise wireless broadband services. He has a comprehensive understanding of telecommunication systems, classroom technologies, LAN/WAN topology, and educational data systems, including student accounting and finance. In 2015 the E-Rate program allowed fiber optic infrastructure as part of the E-Rate program. He has assisted many districts with the design, development and filing of the fiber infrastructure. In fact, he has been responsible for over 80% of the E-Rate approved fiber infrastructure projects in the state of Michigan for Michigan Schools.

Bob Rice also has over 20 years of experience teaching and training in the areas of business and technology. He has developed and administered five different educational technology training programs in the state of Michigan and has presented numerous times in the area of technology management for the annual MAEDS and MSBO conferences. He has also trained professionals in the areas of software and hardware applications, microcomputer applications, total quality management, principles of information systems and the E-Rate program.

## **SUBCONTRACTORS**

Triple R Consultants will perform all obligations under this proposal and any subsequent agreement(s) between Livingston County and Livingston ESA.

## **COUNTY AND DISTRICT ROLES**

Triple R Consultants would like to have one contact person within the Livingston County and Livingston ESA who is knowledgeable about the scope of this proposal and who can assist in gathering the necessary data and documents to facilitate the countywide fiber optic project. And E-Rate application process. In addition, Triple R would like to have one authorized district representative who will review and verify the accuracy of the E-Rate application forms prior to submittal to the Universal Service Administrative Company (USAC) Schools and Library Division (SLD).

## **PROPOSAL GOALS AND EXPECTED OUTCOMES**

Upon successfully completing the detailed services in this proposal, Triple R Consultants expect to achieve the following outcomes:

- To successfully apply for the maximum USF E-Rate funding available to **Livingston ESA**.
- To achieve full compliance with the rules and regulations for **Livingston ESA** E-Rate application submittal process.
- To provide quality consultative services to **Livingston County** and **Livingston ESA** in a timely and professional manner.
- To achieve **Livingston County** and **Livingston ESA**' complete satisfaction.

## **PROPOSAL PRICE**

In exchange for Triple R Consultants services detailed in this proposal, **Livingston County** and **Livingston ESA** will pay Triple R Consultants total compensation of up to **(\$20,000.00)** for services provided as outlined in the foregoing Project Implementation bill at an hourly rate of \$200 per hour. Triple R will invoice **Livingston County** and **Livingston ESA** bi-monthly based on the hours works in this proposal.