

<b>Selective Review- Competitive Bidding Type FUNDING YEAR 2008</b>			
<b>CASE # SR-2008-</b>			
To:		From:	
Your Phone Number:		My Phone Number:	
Your Fax Number:		My Fax Number:	
Entity Name:		My E-Mail Address:	
Today's Date:		Total Pages:	5
<b>PLEASE RESPOND BY:</b>			
Form 471 Application Number(s):			
<b>PLEASE CALL TO CONFIRM THAT THIS DOCUMENT HAS BEEN RECEIVED IN ITS ENTIRETY.</b>			

It is important that we receive all of the information requested within **15** calendar days from the date of this document so that USAC may complete the review of your funding request(s). USAC urges you to carefully review your response before returning it to ensure that you have provided complete responses to all questions. Finally, note that USAC is unable to grant multiple or lengthy extensions to respond to this request for information.

**Who can respond to this request for information?**

This document requests information that must be provided by the applicant or by the applicant's authorized representative.

**How to respond**

Please send your responses to the questions outlined on the following pages to:

Via Fax:	Via Expedited Mail:	Via email:
PIA Selective Review 973-599-6515(fax)	SLD 100 S. Jefferson Road Whippany, NJ 07981	

Thank you for your assistance as we work to assure the integrity of the Schools and Libraries Universal Service Support Mechanism. It is important that we receive all of the information requested within 15 calendar days. *A checklist of the items requested in this document is included on page 2.* If you have any questions regarding this request or these worksheets, please contact the reviewer at the phone number or email address listed above.

## Selective Review Information Request Checklist

Please complete and return with your responses

On the first page of each document you provide write the corresponding FRN(s).

Item #	Items to be returned to the E-Rate Reviewer	Document(s) Title & Corresponding FRN	Status								
1.	Signed & dated contracts and/or other agreements with service providers related to the Form(s) 471		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
2	Request For Proposal (RFP) Please specify: <b>Release date:</b> mo ____/day ____/year ____ <b>Due date:</b> mo ____/day ____/year ____		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
3	All bid responses received for all funding requests. It may be helpful to include a chart as indicated below: <table border="1" style="margin-left: 20px;"> <thead> <tr> <th style="text-align: center;">Appl #</th> <th style="text-align: center;">FRN #</th> <th style="text-align: center;">#of bids received</th> <th style="text-align: center;">Vendor selected</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Appl #	FRN #	#of bids received	Vendor selected						<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A
Appl #	FRN #	#of bids received	Vendor selected								
4	Vendor selection process description (created during the bidding process)		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
5	Was a consultant used relating to the planning, implementation and support of your E-Rate funding requests? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide a signed and dated Consultant Agreement(s) or Letter of Agency		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
6	Correspondence between the consultant/service provider and the school/library regarding the competitive bidding process and the application process		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
7	Technology Plan Support Request for FY 2008 (page 4) Indicate Technology Plan creation date here: <b>Mo.</b> ____/ <b>day</b> ____/ <b>year</b> ____		<input type="checkbox"/> Enclosed								
8	Organizational Structure, such as organizational flow chart, reporting structure, etc.		<input type="checkbox"/> Enclosed <input type="checkbox"/> N/A								
9	Budget Information (page 4) (Approved operating budget or alternative budget documentation for FY 2008) Please check which you have provided: <input type="checkbox"/> Final and Approved budget for 2008-2009 <input type="checkbox"/> Letter and Budget Alternatives		<input type="checkbox"/> Enclosed <input type="checkbox"/> Final and Approved budget for 2008-2009 <input type="checkbox"/> Letter and Budget Alternatives								
10	Selective Review Certification (page 5) (Include signature, title and dated.)		<input type="checkbox"/> Enclosed								

## Selective Review Overview

We are requesting and will be examining information for ALL Form(s) 471 listed on the cover page of this document that were filed by the billed entity for the 2008-2009 funding year (Funding Year 2008). Please notify us if you have any additional Form(s) 471 for your Billed Entity number that we have not listed. Also, please include any applications that may have been filed under a different entity number, if that entity belongs to the Billed Entity (e.g., elementary schools within a School District that file their own applications in addition to the applications filed on their behalf by the School District or a Consortium. This review will include all of those applications as well).

This document is a [quick tool](#) to guide you with your Selective Review responses. **For complete instructions and further information regarding the Selective Review process, USAC recommends** you refer to <http://www.usac.org/sl/applicants/step08/undergo-selective-review>.

**Special note to Consortium applicants:** You have an option to provide us with the information requested below for the overall Consortium, or on a disaggregated basis with information pertaining to each individual entity listed on the Form(s) 471 Block 4 Worksheet C.

Please contact the Selective Review team if you need further assistance in responding to this request on a disaggregated basis or you may refer to <http://www.usac.org/sl/applicants/step08/undergo-selective-review> for additional information.

### **Part I: Information Regarding your Competitive Bidding and Vendor Selection Process**

For each of the following items we have outlined the requested documentation you will need to supply. **Please provide the information by funding request number (FRN) unless otherwise indicated.** In the event that a document (e.g., contract, RFP, bid response, etc.) applies to multiple FRNs, simply indicate on the first page of the document which FRN(s) is supported by the document. If for any reason you do not have any of the documentation requested below, you **MUST provide a complete explanation for why it is missing.**

#### **1) CONTRACTS AND/OR OTHER AGREEMENTS**

Signed and dated copies of any and all agreements related to each of the Form 471 funding request(s), including any and all contracts, agreements, Statements of Work, etc. ( **NOTE: COPIES OF STATE MASTER CONTRACTS ARE NOT REQUIRED IF YOU HAVE ALREADY SENT A COPY OF YOUR STATE MASTER CONTRACT TELL YOUR REVIEWER THE TYPE OF DOCUMENT PROVIDED AND FORM 471 NUMBER, OR IF YOUR STATE MASTER CONTRACT IS LOCATED ON A WEBSITE, PLEASE PROVIDE US WITH THE WEBSITE URL. )**

#### **2) REQUESTS FOR PROPOSAL (RFP)**

Copies of any and all requests for proposals (RFPs), invitations to bid, requests for bids, or other documentation of bid requests for services and/or products requested, or other solicitations in any way associated with the applicant's funding request(s) and/or the selection of the service provider(s) that appear(s) on the applicant's funding request(s). Be sure to include any and all amendments made to the original RFP. All RFPs should indicate when they were first made available to service providers, i.e., release and posting date as well as the due date for which bids must be submitted.

#### **3) BID RESPONSES**

Indicate the number of bids/proposals received for all funding requests and provide complete copies of any and all proposals, bid responses, etc., received in response to the Form 470, and/or any RFP, or other solicitation in any way associated with the applicant's funding request and/or with the selection of the service provider that appears on the applicant's funding requests. This information should be provided for all funding requests including tariff, month-to-month and contracted services.

#### **4) VENDOR SELECTION PROCESS**

Provide all documentation created during the bidding process that indicated how and why you selected the vendor. Include all bids that you received and any other bid documentation such as attendance sheets, correspondences to and from the bidding vendor and a description of your bid evaluation process. This information should be provided for all funding requests including tariff, month-to-month and contracted services.

#### **5) CONSULTING AGREEMENTS**

Please indicate if a consultant was used for the planning, implementation, and support of your E-Rate funding request(s) and provide a signed and dated copy of any consulting agreement (s) or Letters of Agency. If a consultant was not used, please indicate as such.

**6) CORRESPONDENCE**

Provide a copy of all correspondence between your entity and any service providers or consultants regarding the competitive bidding process and the application process.

**7) ORGANIZATIONAL STRUCTURE**

If your organization functions in multiple capacities, such as consultant, service provider, and/or applicant, provide a copy of your organizational flow charts or budget clearly identifying your business functionality and reporting structure in the organization.

*If there is any other documentation that would be helpful to us in our review to ensure that you complied with the Commission's rules requiring a fair and open competitive bidding process, please provide that as well.*

**Part II: Budget and Technology Plan**

**TECHNOLOGY PLAN**

- Provide a copy of the written technology plan that covers Funding Year 2008 (July 1, 2008 through June 30, 2009) that supports and validates the services requested on your applications for Funding Year 2008, and that was in place at the time you filed your Form(s) 470 for FY 2008.
- Please indicate who created the technology plan and/or assisted you with the development (e.g. the School District, a consultant, an ESA, etc.) and who approved or will approve the plan.

Your technology plan helps us better understand the resources that are available to support the funding requests that you have submitted on your Form(s) 471.

<b>Section I: Connectivity</b>	
I-A. Commitment Amount Requested	
• Telecom	1 _____ \$
• Internet Access	2 _____
• Basic Maintenance of Internal Connections	3 _____
• Internal Connections	4 _____
<b>TOTAL</b>	_____
I-B. Form 471 Applicant's Share	
• Telecom	5 _____
• Internet Access	6 _____
• Basic Maintenance of Internal Connections	7 _____
• Internal Connections	8 _____
<b>TOTAL</b>	_____

**OPERATING BUDGET**

**Final, Approved Operating Budget:**

Provide an approved 2008-2009 operating or facilities budget, including total revenues and expenses (covering Funding Year 2008: July 1, 2008 – June 30, 2009) that documents your expenditures and ability to pay your share of the purchased products/services. **(YOU MUST INDICATE THE EXPENSE LINE(S) FROM WHICH YOUR E-RATE SHARE WILL BE PAID.)** If you provide a final approved budget, we may verify that budget with independent sources. Please indicate on the budget whether or not it is final and approved.

**Alternatives to a Final, Approved Operating Budget:**

If a final, approved budget is not available or is still in the approval process, we will accept certain alternative documentation, please go to: <http://www.usac.org/sl/applicants/step08/undergo-selective-review> for further details.

### Selective Review Information Request Completion Certification

Complete and return the enclosed Certification to the Schools and Libraries Division (SLD). If the applicant's authorized representative completed the information in this document, please *attach a copy of the letter of agency or other agreement* between the applicant and consultant authorizing them to act on the school or library's behalf. For the purposes of this form, in the Employer's Name field, a consultant should enter the name of his or her consulting firm. Please note that if an authorized representative signs this form, a signer of school or library official is also required in the space provided below.

SECTION 1: AUTHORIZED SIGNER INFORMATION			
Name of Authorized Signer	Title		
Email Address	Telephone Office:	Fax :	
Authorized Signer's Employer's Name			
Employer's Street Address	State	Zip Code	
SECTION 2: APPLICANT INFORMATION			
Billed Entity Name	Billed Entity Number		
Funding Year 2008 Forms 471 Application Numbers:			
SECTION 3: CERTIFICATION STATEMENTS			
<ul style="list-style-type: none"> <li>▫ I certify that I prepared the responses in this document on behalf of the above named entity.</li> <li>▫ I certify that despite any budget deficits, fund-raising effort shortfalls, or other uncertainties we expect to be able to finance this budget.</li> </ul>			
Authorized Signer's Signature	Date		
Authorized School or Library Official's Signature	Date		
Title of Authorized School or Library Official			

The FCC's Fifth Report and Order (FCC 04-190) released on August 13, 2004, sets out document retention requirements for program participants. Failure to comply with these requirements will put your funding at risk.