

**Before the
FEDERAL COMMUNICATIONS COMMISSION
WASHINGTON, D.C. 20554**

In the Matter of)	
)	
Request for Review of the Decision of the Universal Service Administrator by)	
)	
International Business Machines Corporation)	
)	
Federal-State Joint Board on Universal Service)	CC Docket No. 96-45
)	
Changes to the Board of Directors of the National Exchange Carrier Association, Inc.)	CC Docket No. 97-21
)	
Schools and Libraries Universal Service Support Mechanism)	CC Docket No. 02-6
)	

**REQUEST FOR REVIEW OF THE DECISION OF THE UNIVERSAL SERVICE
ADMINISTRATOR BY INTERNATIONAL BUSINESS MACHINES CORPORATION
REGARDING THE FUNDING REQUEST OF OKLAHOMA CITY SCHOOL DISTRICT
I-89**

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May 9, 2003

SUMMARY

This case is one of a multitude of appeals from SLD decisions denying funding to school districts that followed the letter and spirit of the Commission's E-rate rules and policies. SLD apparently has a vision of a procurement process under which price must be the determinative factor in selecting a vendor and the Form 470 must specify the precise quantity, type, and design of services for which funding is sought. That vision departs from the Commission's clear precedent and cannot be reconciled with the realities of procuring complex, technically sophisticated services.

Internet access and internal connections are not widgets. These are complex services for which there are a variety of means of satisfying a school district's needs. The Commission's decisions in this area prudently recognize this fact, emphasizing that school districts enjoy "maximum flexibility" in selecting a vendor and recognizing that school districts have every incentive to choose the most cost-effective service provider, after considering technical expertise, experience, and other factors in addition to price. Indeed, the Commission has instructed the SLD not to second-guess state and local procurement decisions absent evidence to the contrary.

In this case, as in the other appeals involving similar facts and reasons for denial, there is no such evidence to the contrary. Rather, the SLD simply ignored the fact that it is prohibited from imposing its own vision of how the E-rate procurement process should work. Most fundamentally, SLD improperly withheld funding on the basis that the school district assertedly did not consider price in its vendor selection and did not finalize price prior to selecting a vendor. In actuality, Oklahoma City School District I-89 ("OKCPS") considered price an important factor as part of a procurement process that is fully consistent with Commission precedent and

core principles of federal procurement law. SLD exceeded its authority in effectively preempting the use of that process, depriving OKCPS of the deference and “maximum flexibility” it is due under the Commission’s precedent.

Likewise, SLD’s peculiar vision of the procurement process led it to deny funding because the Form 470 assertedly was too broad. SLD’s action in this regard was both arbitrary and contrary to sound public policy. It was arbitrary because, in at least half a dozen other cases – not involving IBM – SLD approved funding where the Form 470 contained a virtually identical service description to the one filed by OKCPS. And, it was inconsistent with sound policy because school districts – and, more importantly, students – benefit greatly when vendors have flexibility to come up with innovative, cost-saving designs that a school district might not have been able to specify on its own.

Finally, SLD erred in denying funding because OKCPS checked the “no RFP” box when an RFP was subsequently made available. OKCPS’ action was factually accurate and fully consistent with instructions on the SLD’s own Tip Sheet (which was later withdrawn). Moreover, SLD’s denial of funding was once again arbitrary; it granted funding in identical circumstances to the Los Angeles Unified School District (where IBM was not a vendor).

For these reasons, the Commission must reverse SLD’s denial of funding to OKCPS. Although IBM agrees that the E-rate funding must be delivered as efficiently and cost-effectively as possible, and is committed to working with the Commission to that end, any changes to the program must (1) be thoroughly analyzed to assure they will achieve their desired goals, and (2) have only prospective effect. School districts like OKCPS must not be penalized for acting consistently with existing rules and precedent.

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**REQUEST FOR REVIEW OF THE DECISION OF THE UNIVERSAL SERVICE
ADMINISTRATOR BY INTERNATIONAL BUSINESS MACHINES
CORPORATION REGARDING THE FUNDING REQUEST OF OKLAHOMA
CITY SCHOOL DISTRICT I-89**

International Business Machines Corporation (“IBM”), pursuant to Section 54.179 of the Federal Communications Commission’s (“Commission’s”) rules,¹ hereby submits its Request for Review of the Universal Service Administrator’s Funding Decision regarding the Oklahoma City School District I-89 (“District”) for Year 5. IBM was selected by the District to provide the services for which E-rate funding is sought and is an aggrieved party under the Commission’s rules.² In rejecting the District’s application, the Schools and Libraries Division (“SLD”) acted in a manner inconsistent

¹ 47 CFR § 54.719.

² 47 CFR § 54.721.

with explicit Commission rules and precedent, local procurement policies, SLD precedent, as well as other funding grants for Year 5.

I. FACTUAL BACKGROUND

On October 16, 2001 the District submitted to the Schools and Libraries Division (“SLD”) a Form 470 for E-rate support for Funding Year 2002. In its request, the District sought funding for all three categories of services: telecommunications services; Internet access; and internal connections. The District received a Form 470 – Receipt Notification Letter dated October 22, 2001, which indicates that the Form 470 was posted on October 17, 2001.

After filing its Form 470, the District released its RFP, Quotation Number 8839, seeking a “Strategic Technology Solution Provider” pursuant to the District’s purchasing rules.³ Specifically, the District sought “to select a strategic technology partner with the competencies, expertise and resources necessary to assist the Oklahoma City Public School District.”⁴ The RFP indicated that the “agreement will include, but [is] not limited to, E-rate funded products.”⁵

The initial deadline for bids was set for November 19, 2001, but was extended due to questions and specific requests from potential vendors. Eight bidders responded: Mediasoft; Chickasaw Telecom; JDL; Seimens; AVNet; IBM; Compaq; and

³ See *Request for Review by Oklahoma City School District I-89* (filed May 9, 2003) (“District Request”). IBM received a copy of the RFP on November 1, 2001.

⁴ *Oklahoma City Public Schools, Quotation 8839 for Strategic Technology Solution Provider* at 1 (issued October 2001) (“RFP”).

⁵ District Request.

Southwestern Bell.⁶ Specifically, IBM placed a bid focused on cost effectiveness and cost management based on its breadth of experience with educational technologies and the E-rate program.⁷ Pursuant to the RFP, a committee was established to grade and evaluate the bids. On December 13, 2001, IBM was recommended to the District's Chief Executive Officer to become the District's Strategic Technology Solution Provider, and four days later the Board of Education unanimously agreed. According to the District, at no time and in no venue have any of the seven unsuccessful bidders challenged the bid process or the ultimate selection of IBM.

Once IBM was selected as the vendor, the District filed a second comprehensive Form 470, listing all the same categories of services as the initial Form 470 as well two specific additional services. No additional bids were received based on the second Form 470.

Subsequently, IBM and the District entered into a series of Statements of Work finalizing the services to be provided. On January 17, 2002, the District filed a Form 471 for Funding Year 2002 with IBM as the vendor based on the second comprehensive Form 470. Over eleven months later, the District received an E-Rate Selective Review Information Request, seeking documents related to the bid process, which were promptly provided to SLD on January 17, 2003.

On March 10, 2003, the District's application was rejected in a Funding Commitment Decision Letter stating that: (1) selection was made by RFP, and Form 470 indicated no RFP; (2) the services for which funding were sought were not defined when

⁶ *Id.*

⁷ *IBM Response to Oklahoma City Public Schools, Quotation 8839 for Strategic Technology Solution Provider* at 58-62 (issued November 2001).

the vendor selected; (3) the price of services was not a factor in vendor selection; and (4) the price of services was set after vendor selection.

II. THE DISTRICT SELECTED ITS VENDOR PURSUANT TO DISTRICT POLICY BASED ON BOTH THE INITIAL FORM 470 AND THE RFP AS REQUIRED BY COMMISSION RULES

The SLD rejected the District's funding request in part because the SLD asserts that the District selected its vendor based on an RFP, rather than the Form 470. This is factually inaccurate.

The District made its vendor selection based upon both documents, the Form 470 and the RFP. The initial Form 470 outlined the types of services for which support was being sought, and the RFP outlined the criteria that would be used to select a Systems Integrator, whose role, in part, would be to provide the services described in the Form 470. The complementary use of both a Form 470 and RFP is acceptable under the rules. In fact, the Form 470 itself provides potential applicants with the opportunity to reference specific RFPs, if available.⁸ Moreover, according to the District, District purchasing policy requires written specifications for interested vendors for the purchase of goods or services costing more than \$7,500.⁹ The Form 470 was not sufficient to satisfy that requirement. The Commission has explicitly held that the Form 470 posting process "is in no way intended as a substitute for state, local, or other procurement processes."¹⁰ Thus, the District was required to use both the Form 470 and an RFP.

⁸ See Form 470, Block 2, Items 8, 9, and 10.

⁹ District Request.

¹⁰ See *Federal-State Joint Board on Universal Service*, Report and Order, 12 FCC Rcd 8776, ¶ 575 (1997) ("1997 Universal Service Order"); see also 47 C.F.R. § 54.504(a)

As described in section IV below, the Form 470 clearly listed the services subject to bid. After the vendor decision was made based upon the initial Form 470 and the RFP, the District then filed a second Form 470, which included all of the service categories in the first Form 470, in addition to two specific additional services, email and VoIP services. Because the initial Form 470 described all of the categories of services sought, no bidders were prejudiced by this minor omission. The lack of any bids in response to the second Form 470 shows that all potential bidders, including the eight bidders to the first Form 470, realized the procedural nature of the second Form 470. Thus, the vendor decision was based upon a Form 470 and the RFP, inconsistent with FCC rules and precedent and the District's purchasing policies.

III. THE DISTRICT'S FORM 470 WAS PROPERLY COMPLETED AND SERVED ITS PURPOSE UNDER THE RULES

The SLD again places form over substance, rejecting the District's bid based on its response to the question "do you have a Request for Proposal (RFP) that specifies the service you are seeking." On both Form 470s, the District indicated that no RFP was available. This is accurate for the initial Form 470, as the RFP was apparently released after the Form 470 was issued, and is irrelevant in the case of the second Form 470 for the reasons set out above.

The initial Form 470 was filed on October 16, 2001. According to the District, the RFP had yet to be released. Items 8, 9, and 10 of the Form 470 required filing parties to indicate whether they have an RFP for the services covered by the Form. Unlike in other sections of the Form 470, no option is available to applicants who intend to issue an

("These competitive bid requirements apply in addition to state and local competitive bid requirements and are not intended to preempt such state or local requirements.").

RFP in the future. Parties who check “yes” must provide a means by which service providers can access the information. The District thus had no choice but to select “no” for the RFP question. In fact, the District would have violated its certification requirements on Form 470 if it had done otherwise.

In its second Form 470, the District likely indicated there was not an RFP because of the confusing nature of the Form and the advice given to school districts by the SLD and other entities. For example, E-Rate Central’s “Tips” suggest to school districts that “[f]or items (8)-(10), it is not possible to check both ‘YES’ and ‘NO’ if an RFP is available for some portion of the service, but not for all. In such a case, it is better to check ‘NO’ and to list all services required, including those covered by the RFP.”¹¹

Additionally, the SLD made available on its website “Tips for Completing your Form 470,” which included Tip 6 “When a Request for Proposal (“RFP”) is Available.”¹² Tip 6 offered guidance on how to fill out Items 8, 9 and 10 on the Form 470. The Tip was confusing, however, because it appeared to direct a school or library *with an RFP* to check box A in Items 8, 9 and 10 (“Yes, I have an RFP.”), *or* to check box B (“No, I do not have an RFP”) and *indicate a person to contact in order to obtain the RFP*. A school district reasonably could interpret this guidance to mean that it could check “no RFP” on its Form 470 and indicate a contact person for obtaining an RFP. In this instance, the District did include a contact person on both Form 470s. After IBM brought this

¹¹ E-Rate Central: Form 470 Tips (www.eratecentral.com/Form_470_Tipsv2.htm) (last visited May 2, 2003).

¹² USAC: SL: Tips for Successfully Completing the Form 470 (www.sl.universalservice.org/reference/470Tips_Yr4.asp) (last visited Dec. 5, 2002).

confusing guidance to SLD's attention in December 2002, SLD pulled the "Tips" webpage from its website.

The SLD's denial is also inconsistent with its own precedent. SLD funded the Los Angeles Unified School Districts ("LAUSD) Year 5 application (where IBM is not a vendor), despite the fact that LAUSD checked the RFP box "no" and later released and RFP.¹³ The SLD makes no effort to distinguish the cases.¹⁴

Moreover, SLD's denial ignores the purpose of the Form 470. As the FCC has stated, the Form 470 is intended to "include information sufficient to enable service providers to identify potential customers"¹⁵ and to "provide a minimally burdensome means to get competing providers to approach [schools and libraries] so that schools and libraries could then select the best service packages."¹⁶ The Form 470 served its purposes in this case, as the District was able to choose from among eight bidders.

¹³ Los Angeles Unified School District, Form 470, posted October 31, 2001. (LAUSD released its RFI on November 2, 2001).

¹⁴ In similar circumstances, the Commission found that the "objective of ensuring that schools and libraries benefit from the schools and libraries universal service support mechanism" outweighs the "administrative costs" of processing applications, which include an "inadvertent omission." *Request for Review of a Decision of the Universal Service Administrative Company by Naperville Community Unit School District 203 Naperville, Illinois*, Order, 16 FCC Rcd 5032, ¶¶ 14-15 (2001). In that instance, the school district with no intention "to deceive or mislead SLD" failed to answer a particular question on a SLD form based upon potential confusion relating to the application's design and modification. *Id.*, ¶¶ 12-14.

¹⁵ *Federal-State Joint Board on Universal Service, Access Charge Reform, Price Cap Performance Review for Local Exchange Carriers, Transport Rate Structure and Pricing, End User Common Line Charge*, Fourth Order on Reconsideration, 13 FCC Rcd 5318, ¶ 162 (1997).

¹⁶ *Federal-State Joint Board on Universal Service*, Order, 15 FCC Rcd 6732, ¶ 3 (1999).

IV. THE SERVICES FOR WHICH THE DISTRICT SOUGHT FUNDING WERE PROPERLY DEFINED IN THE FORM 470

SLD alleges that the District provided inadequate detail as to the services requested. This is incorrect. The District provided a “summary description” of services as requested in Block 2 of the Form 470. For instance, the District indicated the particular types of telecommunication services requested and the quantity of services: *i.e.*, basis telephone service (POTS, Centrex) for 100+ locations.

This approach of listing a broad overview of potential services in the Form 470 is consistent with level of detail included in other applications the SLD funded this year. For instance, Denver School District 1 sought “basic telephone service” for “146 sites”; San Francisco Unified School District sought “basic telephone service (POTS, Centrex, trunk)” for “up to 150 locations”; Kansas City School District sought “local and long distance services” for “all 80+ schools plus admin”; St. Louis School District sought “local and long distance svcs” for “113 schools plus admin”; and the Houston Independent School District sought “basic telephone service (POTS, Centrex) for “350 buildings.”¹⁷ None of the applicants described above referred to an RFP or either Form 470. Thus, these applicants, none of which chose IBM as its service provider, had similar descriptions of services as the District, but they were granted SLD funding. The Commission should not sanction such arbitrary and capricious treatment.

¹⁷ Moreover, the services described in the Form 470 were sufficiently detailed to allow service providers to contact the District for additional information, and, in the end, resulted in eight applications.

V. THE DISTRICT ASSESSED THE PRICES OF POTENTIAL VENDORS AND FOCUSED ON OVERALL COST-EFFECTIVENESS

In denying the District's funding request, the SLD asserts that price of services was not a factor in vendor selection. Yet the District's RFP clearly establishes that price played a vital role in IBM's selection as a vendor.

The RFP set the seven factors on which the vendor selection decision would be based, including price and district funding consideration. The factors selected were those "critical to a company's ability to effectively assist OKCPS to infuse technology and better prepare students to be successful citizens and productive workers."¹⁸ Specifically, the factors were: availability and quality of resources (30 points); staff development and training (20 points); project management/systems integration (50 points); technology solutions (25 points); commitment to K-12 education (20 points); district funding considerations (100 points); pricing model and cost assurances (25 points); other vendor attributes (30 points).¹⁹ The District warned bidders that "[i]t cannot be, over emphasized how important this [pricing] criterion is to the potential success of any prospective bidders."²⁰ To that end, bidders were required to "[i]nclude a proposed schedule of hourly charges and/or other services based pricing," and bidders were put on notice that "a specific price quote may be required upon completion of the final negotiated contracts for the E-rate eligible projects."²¹

¹⁸ RFP at 3.

¹⁹ RFP at 4-12.

²⁰ RFP at 10.

²¹ *Id.*

In addition, the District stated that “it is vitally important that OKCPS get value for its dollar in the other areas included in this scope of work and is able to demonstrate this to the OKCPS Board.”²² To that end, bidders were advised to “provide a proposed pricing model,” which “adhere[s] to district purchasing policy,” “provide[s] the flexibility and services necessary to complete the anticipated project set (range of services),” and “demonstrate[s] ... that the costs associated with this partnership are within normal and customary charges for the types of services provided.”²³

Thus, price was clearly included in the vendor selection process. The RFP criteria are similar to the criteria found acceptable by the Commission in the *Tennessee Order*.²⁴

In that case, the Commission upheld an SLD decision granting funding for Internet access services provided by ENA, even though ENA’s bid assertedly was twenty million dollars higher than the bid submitted by the protesting bidder. The Tennessee Department of Education awarded the contract to ENA based on a finding of superior technical merit, using an RFP that afforded technological considerations more weight than cost, required cost to be considered only after evaluation of non-cost factors, and permitted additional negotiation with a vendor after its initial selection by the state.²⁵

²² *Id.*

²³ *Id.*

²⁴ *Request for Review by the Department of Education of the State of Tennessee of the Decision of the Universal Service Administrator, Request for Review by Integrated Systems and Internet Solutions, Inc., of the Decision of the Universal Service Administrator, Request for Review by Education Networks of America of the Decision of the Universal Service Administrator, Federal-State Joint Board on Universal Service, Changes to the Board of Directors of the National Exchange Carrier Association, Inc., Order, 14 FCC Rcd 13734 (1999) (“Tennessee Order”).*

²⁵ The RFP provided for a maximum of 45 points for technological approach, 30 points for cost, 15 points for proposer experience, and 10 points for proposer

The Commission expressly approved the weighting system used by the Tennessee Department of Education.

In addition, under well-established Commission precedent, state and local procurement officials enjoy “‘*maximum flexibility*’ to take service quality into account and to choose the offering . . . that meets their needs ‘most effectively and efficiently.’”²⁶ The Commission’s rules and decisions establish that price is an important, but not necessarily determinative factor in awarding contracts for which E-rate funding is sought. Rather, the guiding principle is that state and local procurement officials must select the most cost-effective alternative, taking into account price, quality, and other relevant factors.²⁷ In this case, the evidence shows that the District balanced its criteria to find the most cost-effective vendor.

VI. PRICES WERE SET PURSUANT TO WELL-ESTABLISHED PROCUREMENT RULES

SLD denied the funding request of the District because the prices assertedly were set after vendor selection, yet price was considered as a primary factor in the initial vendor selection as described in section V above. Specifically, based on its evaluation of the eight bids, the District identified IBM as the vendor most qualified to implement the District’s technological plan based its resources, experiences, and price. Once that

qualifications. *See* Tennessee RFP, § 6.1, attached to *Opposition of Educations Networks of America*, CC Docket Nos. 96-45, 97-21, Application No., 18132 (filed April 13, 1999).

²⁶ *1997 Universal Service Order*, ¶ 481 (emphasis added).

²⁷ *See* 47 C.F.R. § 54.511(a) (expressly authorizing state and local procurement officials to “consider relevant factors other than the pre-discount prices submitted by providers”); *1997 Universal Service Order*, ¶ 481 (in addition to price, prior experience, past performance, personnel qualifications, technical excellence, and management capabilities are factors that form a “reasonable basis” for evaluating whether an offer is cost-effective).

selection was made in December 2001, IBM and the District entered into several Statements of Work in January 2002, which established specific prices for individual components of the funding request.

Moreover, the SLD has ignored the District's clear self-interest in selecting the most cost-effective vendor. As the Commission stated:

“even in those instances when schools have not established competitive bid procurement processes, the Administrator generally need not make a separate finding that a school has selected *the most cost-effective bid*. Such a finding is not generally necessary because a school has an *incentive to select the most cost-effective bid*, even apart from any procurement requirements, because it must pay its pro rata share of the cost of the services requested.”²⁸

In addition, the District is responsible for ineligible costs and services under the E-rate program. The SLD's denial is also inconsistent with the Commission's repeated reluctance to enter into matters of state and local procurement and purchasing processes, and according to the District, all state and local procurement laws were followed.²⁹

VII. REQUEST FOR REVIEW

For the foregoing reasons, the Commission should reverse all of SLD's grounds for denying the District's funding requests, and IBM respectfully requests that the Commission order SLD to grant District's Year 5 funding request. To that end, IBM urges that the Commission expedite this appeal, as any delay in funding directly affects the schoolchildren of Oklahoma City for which the E-rate program was created to help.

²⁸ *Tennessee Order*, ¶ 10.

²⁹ The Commission has explicitly held that the Form 470 posting process “is in no way intended as a substitute for state, local, or other procurement processes.” *1997 Universal Service Order*, ¶ 575.

Likewise, appeals for other funding requests, which include the same invalid grounds for dismissal should also be promptly rejected.

Respectfully submitted:

INTERNATIONAL BUSINESS MACHINES

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Its Attorneys

May 9, 2003

CERTIFICATE OF SERVICE

I, Bradley K. Gillen, hereby declare that copies of the foregoing were delivered by U.S. mail or through ECFS, this day, May 9, 2003, to the following:

Marlene H. Dortch
Secretary
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ATTACHMENTS

**REQUEST FOR REVIEW OF THE DECISION OF THE UNIVERSAL SERVICE
ADMINISTRATOR BY INTERNATIONAL BUSINESS MACHINES CORPORATION
REGARDING THE OKLAHOMA CITY SCHOOL DISTRICT I-89**

MAY 9, 2003

Attachment A: FCC Form 470

FCC Form

Approval by OMB
3060-0806

470

**Schools and Libraries Universal Service
Description of Services Requested
and Certification Form**

Estimated Average Burden Hours Per Response: 5.0 hours

This form is designed to help you describe the eligible telecommunications-related services you seek so that this data can be posted on the Fund Administrator website and interested service providers can identify you as a potential customer and compete to serve you.

Please read instructions before completing.

(To be completed by entity that will negotiate with providers.)

Block 1: Applicant Address and Identifications
(School, library, or consortium desiring Universal Service funding.)

Form 470 Application Number: 595520000370566
Applicant's Form Identifier: OCPS-PY5-470-01
Application Status: CERTIFIED
Posting Date: 10/16/2001
Allowable Contract Date: 11/13/2001
Certification Received Date: 10/23/2001

1. Name of Applicant: OKLAHOMA CITY SCHOOL DIST I-89			
2. Funding Year: 07/01/2002 - 06/30/2003		3. Your Entity Number 139831	
4. Applicant's Street Address, P.O.Box, or Route Number			
a. Street 900 N KLEIN AVE			
City OKLAHOMA CITY	State OK	Zip Code 5Digit 73106	Zip Code 4Digit 7036
b. Telephone number (405) 297- 6522		c. Fax number (405) 297- 6548	
d. E-mail Address sewasham@okcps.k12.ok.us			
5. Type Of Applicant (Check only one box)			
<input type="radio"/> Library (including library system, library branch, or library consortium applying as a library)			
<input type="radio"/> Individual School (individual public or non-public school)			
<input checked="" type="radio"/> School District (LEA;public or non-public[e.g., diocesan] local district representing multiple schools)			
<input type="radio"/> Consortium (intermediate service agencies, states, state networks, special consortia)			
6a. Contact Person's Name: Steve Washam			
6b. Street Address, P.O.Box, or Route Number (if different from Item 4)			

<input type="radio"/> 900 N KLEIN AVE			
City OKLAHOMA CITY	State OK	Zip Code 5Digit 73106	Zip Code 4Digit 7036
<input type="radio"/> 6c. Telephone Number (10 digits + ext.) (405) 297- 6852			
<input type="radio"/> 6d. Fax Number (10 digits) (405) 297- 6773			
<input checked="" type="radio"/> 6e. E-mail Address (50 characters max.) sewasham@okcps.k12.ok.us			

Block 2: Summary Description of Needs or Services Requested

7 This Form 470 describes (check all that apply):

a. Tariffed services - telecommunications services, purchased at regulated prices, for which the applicant has no signed, written contract. A new Form 470 must be filed for tariffed services for each funding year.

b. Month-to-month services for which the applicant has no signed, written contract. A new Form 470 must be filed for these services for each funding year.

c. Services for which a new written contract is sought for the funding year in Item 2.

d. A multi-year contract signed on or before 7/10/97 but for which no Form 470 has been filed in a previous program year.

NOTE: Services that are covered by a qualified contract for all or part of the funding year in Item 2 do NOT require filing of Form 470. A qualified contract is a signed, written contract executed pursuant to posting a Form 470 in a previous program year OR a contract signed on/before 7/10/97 and reported on a Form 470 in a previous year as an existing contract.

8 Telecommunications Services
Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a. YES, I have an RFP. Choose one of the following: It is available on the Web at _____ or via the Contact Person in Item 6 or the contact listed in Item 11.

b. NO, I do not have an RFP for these services.

If you answered NO, you must list below the Telecommunications Services you seek. Specify each service or function (e.g., local voice service) and quantity and/or capacity (e.g., 20 existing lines plus 10 new ones). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Telecommunications Services, and remember that only common carrier telecommunications companies can provide these services under the universal service support mechanism. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
basic telephone service (POTS, Centrex)	for 100+ - locations
long distance	for 100+ - locations
highbandwidth service (56kb/s, ISDN, DSL, Frame Relay, Fractional T-1, DS-1, DS-3, OC-3, ATM, Satellite, MAN, WAN, LAN interconnect	for 100+ - locations
wireless service (cellular, PCS, paging, WAN, LAN)	for 100+ - locations
Video service, interactive TV, distance learning	for 100+ - locations
maintenance/ installation (inside wire maintenance)	for 100+ - locations

homework hotline service for 100+ - locations

9 Internet Access

Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a **YES**, I have an RFP. Choose one of the following: It is available on the Web at
or via the Contact Person in Item 6 or the contact listed in Item 11.

b **NO**, I do not have an RFP for these services.

If you answered NO, you must list below the Internet Access Services you seek. Specify each **service or function** (e.g., monthly Internet service) and quantity and/or capacity (e.g., for 500 users). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Internet Access Services. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
internet access	for 100+ - locations
wireless service (WAN LAN)	for 100+ - locations
high bandwidth service (56kbs, ISDN, DSL, frame relay, fractional T-1, DS-1, DS-3, OC-3, ATM, satallite, MAN, WAN, LAN interconnect)	for 100+ - locations
maintenance / installation	for 100+ - locations

10 Internal Connections

Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a **YES**, I have an RFP. Choose one of the following: It is available on the Web at
or via the Contact Person in Item 6 or the contact listed in Item 11.

b **NO**, I do not have an RFP for these services.

If you answered NO, you must list below the Internal Connections Services you seek. Specify each **service or function** (e.g., local area network) and quantity and/or capacity (e.g., connecting 10 rooms and 300 computers at 56Kbps or better). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Internal Connections Services. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
Wiring (CAT3, CAT5, coax, fiber, conduit, wiring accessories)	for 100+ - locations
routers, servers, switches, hubs, and upgrades	for 100+ - locations
PBX, KSU, ARS, console, components and upgrtades	for 100+ - locations
video CODEC, MCU, MPEG encoder, multimedia kit, PVBX, video group and desktop equipment, EMMI	for 100+ - locations
maintenance/ installation, on-site technical support, documentation	for 100+ - locations
wireless service (LAN, WAN)	for 100+ - locations
video equipment (broadband amplifier, cable box and modem)	for 100+ - locations
ATM equipment (edge device, EMMI)	for 100+ - locations
hardware and upgrades for internal connections (CSU/DSU, antenna, DAT, line sharing device, media converter, modem, monitor, multiplexing,	for 100+ - locations

satellite dish, TA, terminal server, UPS, zip drive)	
internal connections components (backup power supply and batteries, cabinets, and power strips, circuit card, ethernet card, graphic card, hard disk array controller, RAID, MAU, NIC, SNMP module)	for 100+ - locations
operational software and upgrades, e-mail software	for 100+ - locations

11 (Optional) Please name the person on your staff or project who can provide additional technical details or answer specific questions from service providers about the services you are seeking. This need not be the contact person listed in Item 6 nor the signer of this form.

Name: Steve Finch	Title:
-----------------------------	--------

Telephone number (10 digits + ext.)
(405) 297 - 6618

Fax number
() -

E-mail Address (50 characters max.)
sdfinch@okcps.k12.ok.us

12. Check here if there are any restrictions imposed by state or local laws or regulations on how or when providers may contact you or on other bidding procedures. Please describe below any such restrictions or procedures, and/or give Web address where they are posted.

13. (Optional) Purchases in future years: If you have plans to purchase additional services in future years, or expect to seek new contracts for existing services, summarize below (including the likely time-frames).

Block 3: Technology Assessment

14. **Basic telephone service only:** If your application is for basic local and long distance voice telephone service only, check this box and skip to Item 16.

15. Although the following services and facilities are ineligible for support, they are usually necessary to make effective use of the eligible services requested in this application. Unless you indicated in Item 14 that your application is ONLY for basic telephone service, you must check at least one box in (a) through (e). You may provide details for purchases being sought.

a. Desktop communications software: Software required has been purchased; and/or is being sought.

b. Electrical systems: adequate electrical capacity is in place or has already been arranged; and/or upgrading for additional electrical capacity is being sought.

c. Computers: a sufficient quantity of computers has been purchased; and/or is being sought.

d. Computer hardware maintenance: adequate arrangements have been made; and/or are being sought.

e. Staff development: all staff have had an appropriate level of training or additional training has already been scheduled; and/or training is being sought.

f. Additional details: Use this space to provide additional details to help providers to identify the services you desire.

Block 4: Recipients of Service

16. Eligible Entities That Will Receive Service:

Check the ONE choice that best describes this application and the eligible entities that will receive the services described in this application.

You must select a state if (b) or (c) is selected: **OK**

a. **Individual school or single-site library: Check here, and enter the billed entity in Item 17.**

b. **Statewide application (check all that apply):**

- All public schools/districts in the state:
- All non-public schools in the state:
- All libraries in the state:

If your statewide application includes INELIGIBLE entities, check here. If checked, complete Item 18.

c. **School district, library system, or consortium application to serve multiple eligible sites:**

Number of eligible sites	100
<i>For these eligible sites, please provide the following</i>	
Area Codes (list each unique area code)	Prefixes associated with each area code (first 3 digits of phone number) separate with commas, leave no spaces
405	231, 297, 424, 427, 478, 521, 556, 685, 771, 84 <input type="text"/>
If your application includes INELIGIBLE entities, check here. <input type="checkbox"/> If checked, complete Item 18.	

17. Billed Entities

Entity Name	Entity Number
OKLAHOMA CITY SCHOOL DIST I-89	139831

18. Ineligible Entities

Ineligible Participating Entity	Entity Number	Area Code	Prefix

Block 5: Certification**19. The applicant includes:(Check one or both)**

- a. schools under the statutory definitions of elementary and secondary schools found in the Elementary and Secondary Education Act of 1965, 20 U.S.C. Secs. 8801(14) and (25), that do not operate as for-profit businesses, and do not have endowments exceeding \$50 million; and/or
- b. libraries or library consortia eligible for assistance from a State library administrative agency under the Library Services and Technology Act of 1996 that do not operate as for-profit businesses and whose budgets are completely separate from any school (including, but not limited to) elementary and secondary schools, colleges and universities.

20. All of the individual schools, libraries, and library consortia**receiving services under this application are covered by:**

- a. individual technology plans for using the services requested in the application
- b. higher-level technology plans for using the services requested in the application
- c. no technology plan needed; application requests basic local and long distance telephone service only.

21. Status of technology plans (if representing multiple entities with mixed technology plan status, check both a and b):

- a. technology plan(s) has/have been approved by a state or other authorized body.
- b. technology plan(s) will be approved by a state or other authorized body.
- c. no technology plan needed; application requests basic local and long distance telephone service only. .

22. I certify that the services the applicant purchases at discounts provided by 47 U.S.C. Sec. 254 will be used solely for educational purposes and will not be sold, resold, or transferred in consideration for money or any other thing of value.

23. I recognize that support under this support mechanism is conditional upon the school(s) or library(ies) I represent securing access to all of the resources, including computers, training, software, maintenance, and electrical connections necessary to use the services purchased effectively.

24. I certify that I am authorized to submit this request on behalf of the above-named entities, that I have examined this request, and to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

25. Signature of authorized person:

26. Date (mm/dd/yyyy): **10/22/2001**

27. Printed name of authorized person: **Dr. William Weitzel**

28. Title or position of authorized person: **Superintendent**

29. Telephone number of authorized person: **(405) 297 - 6570** ext.

[New Search](#)[Return To Search Results](#)

Attachment B: FCC Form 470

FCC Form

Approval by OMB
3060-0806**470**

Schools and Libraries Universal Service Description of Services Requested and Certification Form

Estimated Average Burden Hours Per Response: 5.0 hours

This form is designed to help you describe the eligible telecommunications-related services you seek so that this data can be posted on the Fund Administrator website and interested service providers can identify you as a potential customer and compete to serve you.

Please read instructions before completing.

(To be completed by entity that will negotiate with providers.)

Block 1: Applicant Address and Identifications

(School, library, or consortium desiring Universal Service funding.)

Form 470 Application Number: **304190000405654**Applicant's Form Identifier: **OCPS-PY5-470-2**Application Status: **CERTIFIED**Posting Date: **12/19/2001**Allowable Contract Date: **01/16/2002**Certification Received Date: **12/19/2001**

1. Name of Applicant:

OKLAHOMA CITY SCHOOL DIST I-89

2. Funding Year:

07/01/2002 - 06/30/2003

3. Your Entity Number

139831

4. Applicant's Street Address, P.O.Box, or Route Number

a. Street

900 N KLEIN AVE

City

OKLAHOMA CITY

State

OK

Zip Code 5Digit

73106

Zip Code 4Digit

7036

b. Telephone number

ext.

(405) 297- 6712

C. Fax number

(405) 297- 6548

d. E-mail Address

SDFINCH@OKCPS.ORG5. Type Of Applicant (*Check only one box*)

- Library (including library system, library branch, or library consortium applying as a library)
- Individual School (individual public or non-public school)
- School District (LEA; public or non-public[e.g., diocesan] local district representing multiple schools)
- Consortium (intermediate service agencies, states, state networks, special consortia)

6a. Contact Person's Name: **Steve Finch**

6b. Street Address, P.O.Box, or Route Number (if different from Item 4)

<input type="radio"/> 900 N. Klein Ave.			
City Oklahoma City	State OK	Zip Code 5Digit 73106	Zip Code 4Digit 7036
<input type="radio"/> 6c. Telephone Number (10 digits + ext.) (405) 297- 6618			
<input type="radio"/> 6d. Fax Number (10 digits) (405) 297- 6773			
<input checked="" type="radio"/> 6e. E-mail Address (50 characters max.) sdfinch@okcps.org			

Block 2: Summary Description of Needs or Services Requested

7 This Form 470 describes (check all that apply):

a. Tariffed services - telecommunications services, purchased at regulated prices, for which the applicant has no signed, written contract. A new Form 470 must be filed for tariffed services for each funding year.

b. Month-to-month services for which the applicant has no signed, written contract. A new Form 470 must be filed for these services for each funding year.

c. Services for which a new written contract is sought for the funding year in Item 2.

d. A multi-year contract signed on or before 7/10/97 but for which no Form 470 has been filed in a previous program year.

NOTE: Services that are covered by a qualified contract for all or part of the funding year in Item 2 do NOT require filing of Form 470. A qualified contract is a signed, written contract executed pursuant to posting a Form 470 in a previous program year OR a contract signed on/before 7/10/97 and reported on a Form 470 in a previous year as an existing contract.

8 Telecommunications Services
Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a. YES, I have an RFP. Choose one of the following: It is available on the Web at _____ or via the Contact Person in Item 6 or the contact listed in Item 11.

b. NO, I do not have an RFP for these services.

If you answered NO, you must list below the Telecommunications Services you seek. Specify each service or function (e.g., local voice service) and quantity and/or capacity (e.g., 20 existing lines plus 10 new ones). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Telecommunications Services, and remember that only common carrier telecommunications companies can provide these services under the universal service support mechanism. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
basic telephone service (POTS, Centrex, trunk)	103 sites
long distance, calling cards	103 sites
highbandwidth service (56kb/s, isdn, dsl, frame relay, fractional T-1, SD-1, DS-3, OC-3, ATM, satellite, MAN, WAN, LAN interconnect, wireless service (Cellular, PCS, paging, LAN, WAN)	103 sites
Video service, Interactive TV, Distance LEarning	103 sites
Maintenance/installation (inside wiring maintenance)	103 sites
internet 2	103 sites

Homework hot line service	103 sites
dark fiber, professional services	103 sites

9 Internet Access

Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a **YES**, I have an RFP. Choose one of the following: It is available on the Web at
or via the Contact Person in Item 6 or the contact listed in Item 11.

b **NO**, I do not have an RFP for these services.

If you answered NO, you must list below the Internet Access Services you seek. Specify each **service or function** (e.g., monthly Internet service) and quantity and/or capacity (e.g., for 500 users). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Internet Access Services. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
internet access (bundled, unbundled)	103 sites
WAN dark Fiber	103 sites
high bandwidth service (56kss, ISDN, DSL, Frame Relay, fractional T-1, DS-1, DS-3, OC-3, ATM, satellite, MAN, WAN, LAN, interconnec)	103 sites
maintenance/ installation	103 sites
e-mail	103 sites
construction costs, contingency fees, leasing fees, professional services, per diem, travel time	103 sites

10 Internal Connections

Do you have a Request for Proposal (RFP) that specifies the services you are seeking ?

a **YES**, I have an RFP. Choose one of the following: It is available on the Web at
or via the Contact Person in Item 6 or the contact listed in Item 11.

b **NO**, I do not have an RFP for these services.

If you answered NO, you must list below the Internal Connections Services you seek. Specify each **service or function** (e.g., local area network) and quantity and/or capacity (e.g., connecting 10 rooms and 300 computers at 56Kbps or better). See the Eligible Services List at www.sl.universalservice.org for examples of eligible Internal Connections Services. Add additional lines if needed.

Service or Function:	Quantity and/or Capacity:
wiring (cat3, cat5, coax, fiber, conduit, wiring accessories)	103 sites
routers, servers, switches, hubs and upgrades	103 sites
PBX, KSU, ARS, console, components and upgrades, voice compression module, VIC, VoIP	103 sites
video CODEC, MCU, MPEG encoder, PVBX, video group and desktopequipment, EMMI	103 sites
maintenance/ installation, technical support, documentation, extended warranty	103 sites
wireless service, LAN	103 sites
video equipment, (broadband amplifier, cable box and modem	103 sites
ATM equipment (edge device, EMMI)	103 sites

hardware and upgrades for internal connections (CSU/DSU, antenna, tape backup, line sharing devise, media converter, modem, monitor, multiplexing, satellite dish, TA, terminal server, UPS, zip drive, DIMM, transciever)	103 sites
Internal connections components (backup power supply and batteries, cabinents, and power strips, circuit card, ethernet card, graphics card, hard disk array controller, RAID, MAU, NIC, SNMP Module,multiport serial card)	103 sites
operational software and upgrades, e-mail software, clients access licenses, programming and configuration charges	103 sites
construction costs, contingency fees, leasing fees, professional services, per diem, travel time	103 sites

11 (Optional) Please name the person on your staff or project who can provide additional technical details or answer specific questions from service providers about the services you are seeking. This need not be the contact person listed in Item 6 nor the signer of this form.

Name: Steve Finch	Title: Chief Technology Officer
-----------------------------	---

Telephone number (10 digits + ext.)
(405) 297 - 6618

Fax number
(405) 297 - 6773

E-mail Address (50 characters max.)
sdfinch@okcps.org

12. Check here if there are any restrictions imposed by state or local laws or regulations on how or when providers may contact you or on other bidding procedures. Please describe below any such restrictions or procedures, and/or give Web address where they are posted.

13. (Optional) Purchases in future years: If you have plans to purchase additional services in future years, or expect to seek new contracts for existing services, summarize below (including the likely time-frames).

Block 3: Technology Assessment

14. **Basic telephone service only:** If your application is for basic local and long distance voice telephone service only, check this box and skip to Item 16.

15. Although the following services and facilities are ineligible for support, they are usually necessary to make effective use of the eligible services requested in this application. Unless you indicated in Item 14 that your application is ONLY for basic telephone service, you must check at least one box in (a) through (e). You may provide details for purchases being sought.

a. Desktop communications software: Software required has been purchased; and/or is being sought.

b. Electrical systems: adequate electrical capacity is in place or has already been arranged; and/or upgrading for additional electrical capacity is being sought.

c. Computers: a sufficient quantity of computers has been purchased; and/or is being sought.

d. Computer hardware maintenance: adequate arrangements have been made; and/or are being sought.

e. Staff development: all staff have had an appropriate level of training or additional training has already been scheduled; and/or training is being sought.

f. Additional details: Use this space to provide additional details to help providers to identify the services you desire.

Block 4: Recipients of Service

16. Eligible Entities That Will Receive Service:

Check the ONE choice that best describes this application and the eligible entities that will receive the services described in this application.

You must select a state if (b) or (c) is selected: **OK**

a. **Individual school or single-site library: Check here, and enter the billed entity in Item 17.**

b. **Statewide application (check all that apply):**

- All public schools/districts in the state:
- All non-public schools in the state:
- All libraries in the state:

If your statewide application includes INELIGIBLE entities, check here. If checked, complete Item 18.

c. **School district, library system, or consortium application to serve multiple eligible sites:**

Number of eligible sites	103
<i>For these eligible sites, please provide the following</i>	
Area Codes (list each unique area code)	Prefixes associated with each area code (first 3 digits of phone number) separate with commas, leave no spaces
405	231, 232, 235, 264, 278, 297, 424, 427, 478, 52
If your application includes INELIGIBLE entities, check here. <input type="checkbox"/> If checked, complete Item 18.	

17. Billed Entities

Entity Name	Entity Number
OKLAHOMA CITY SCHOOL DIST I-89	139831

18. Ineligible Entities**Ineligible Participating
Entity****Entity
Number****Area
Code****Prefix****Block 5: Certification****19. The applicant includes:(Check one or both)**

- a. schools under the statutory definitions of elementary and secondary schools found in the Elementary and Secondary Education Act of 1965, 20 U.S.C. Secs. 8801(14) and (25), that do not operate as for-profit businesses, and do not have endowments exceeding \$50 million; and/or
- b. libraries or library consortia eligible for assistance from a State library administrative agency under the Library Services and Technology Act of 1996 that do not operate as for-profit businesses and whose budgets are completely separate from any school (including, but not limited to) elementary and secondary schools, colleges and universities.

20. All of the individual schools, libraries, and library consortia receiving services under this application are covered by:

- a. individual technology plans for using the services requested in the application
- b. higher-level technology plans for using the services requested in the application
- c. no technology plan needed; application requests basic local and long distance telephone service only.

21. Status of technology plans (if representing multiple entities with mixed technology plan status, check both a and b):

- a. technology plan(s) has/have been approved by a state or other authorized body.
- b. technology plan(s) will be approved by a state or other authorized body.
- c. no technology plan needed; application requests basic local and long distance telephone service only. .

22. I certify that the services the applicant purchases at discounts provided by 47 U.S.C. Sec. 254 will be used solely for educational purposes and will not be sold, resold, or transferred in consideration for money or any other thing of value.

23. I recognize that support under this support mechanism is conditional upon the school(s) or library(ies) I represent securing access to all of the resources, including computers, training, software, maintenance, and electrical connections necessary to use the services purchased effectively.

24. I certify that I am authorized to submit this request on behalf of the above-named entities, that I have examined this request, and to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

25. Signature of authorized person:

26. Date (mm/dd/yyyy): **12/18/2001**

27. Printed name of authorized person: **Steve Finch**

28. Title or position of authorized person: **Chief Technology Officer**

29. Telephone number of authorized person: **(405) 297 - 6618** ext.

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Attachment C: District RFP



1601 IEM Expressway, Ste. 500, Oklahoma City, OK 73116

Fax Cover This is a confidential message, intended solely for the person to whom it is addressed. If you receive this message in error, please forward it to the correct person, or mail it back to us. Thank you.

To Jake Wood
Fax No. 1-800-242-6329
From Rhyonda Vinson tieline 422-1330
Date 11/07/2001
Subject RFQ - Oklahoma City Public Schools #8839
Closing 11/19/01 @ 2:00pm
Pages 22, including this one

Jake, call if you do not receive all Twenty-two (22) pages.

Rhyonda

2 NOV 01 11:30

NSD-ORC-295-

QUOTATION NUMBER: 8839

**OKLAHOMA CITY PUBLIC SCHOOLS
2500 NE 30th
OKLAHOMA CITY, OK 73111**

October 15, 2001

QUOTATIONS are requested by the Board of Education of the Oklahoma City Public School District I-89, Oklahoma County, Oklahoma, at the office of the Purchasing Manager, 2500 NE 30th, Oklahoma City, Oklahoma, no later than 12:00 noon, Monday, November 19, 2001. Will open at 2:00 pm.
Strategic Technology Solution Provider.

Board of Independent School District I-89 of Oklahoma County, Oklahoma, is under no obligation to accept any quotation and reserves the right to accept or reject any or all quotations. The board of Education also reserves the right to make such selections as in its judgment is best suited for the purpose intended.

INSTRUCTIONS:

All quotations shall be submitted on the prepared quotation blanks. Additional quotation blanks, plans and specifications and /or description of materials and/or services desired, are available at the office of the Purchasing manager.

The Board of Education, in some cases, employs for sake of brevity certain brand names and numbers in lieu of detailed specifications. Vendors are to quote on these items or their equivalent. Vendors must submit complete specifications and descriptive literature if quoting an alternate brand on any item.

Quote all prices delivered free of all freight and handling charges (FOB DESTINATION), to the Oklahoma City Public Schools' Service Center, 2500 N. E. 30, Oklahoma City, Oklahoma-73121, between the hours of 7:30 a.m. and 3:30 p.m. - weekdays. No additional charges will be allowed above quoted prices.

The Oklahoma City Public School District is committed to a policy of equal employment opportunity and affirmative action, and does not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin, or handicap. Utilization of any agency for goods and services is predicated upon its adherence to a similar policy of non-discrimination and affirmative action.

Prices quoted should be net and include all discounts available. Term discounts separately cannot be considered.

Brand and model number of item being quoted must be indicated. Delivery quoted should reflect actual number of days required for material to be delivered after receipt of the purchase order by the successful vendor.

Prices quoted are to be firm for sixty days after receipt of purchase order unless otherwise so stated by the vendor on the returned quotation.

Quotation Instructions (continued)

The Board of Education of Independent School district Number 89 of Oklahoma County, Oklahoma is exempt from paying taxes according to TITLE 68, SECTION 1256 (I), OKLAHOMA STATUTES 1992 SUPPLEMENT.

Prices quoted should be free of all taxes.

NOTE: Return two copies to quotation. Indicate quotation number and opening date on your return envelope.

VENDOR MUST PROVIDE THE INFORMATION BELOW:

I, nor the firm, corporation, or partnership represented by my signature on this quotation, nor anyone acting for such firm, corporation, or partnership, have communicated directly or indirectly concerning this quotation, to any competitor or any other person engaged in such line of business, nor have I entered into collusion with other prospective vendors in restraint of freedom of competition by agreeing to quote at a fixed price or to refrain from quoting, or otherwise.

(NAME OF VENDOR) (SIGNATURE) (DATE)

(TYPED SIGNATURE)

(ADDRESS OF FIRM) (CITY) (STATE) (ZIP)
(TELEPHONE)

NOTE: If any items found in this quotation are classified as hazardous under the provisions of 29 CFR part 1910, subpart z, or is otherwise hazardous, including but not limited to chemicals which are known or suspected carcinogens; toxic or highly toxic agents; reproductive toxins; irritants; corrosives; sensitizers; hepatopietic systemics; or agents which damage the lungs, skin, eyes or mucous membranes; a material safety data sheet must be provided before we will accept shipment.

MAILING ADDRESS:

Belptry Dean, Purchasing Department
Oklahoma City Public Schools
2500 NE 30th
Oklahoma City, OK 73111

Telephone 405-426-4300

Fax: 405-426-4316

Oklahoma City Public School District
Request for Proposal #

Oklahoma City Public School District requests proposals for a Strategic Technology Solution Provider.

1. GENERAL SCOPE AND PURPOSE OF PROCUREMENT:

The purpose of this RFP is to select a strategic technology partner with the competencies, expertise and resources necessary to assist the Oklahoma City Public School District (OKCPS) in effectively infusing technology throughout the district. The technology infusion should result in significantly improved student achievement, and improved administrative practices in support of teaching and learning.

OKCPS is looking for a single vendor to assist the Technology Planning Committee (TCP) chaired by the Information Technology Officer, with the implementation of technology at both a technical and financial level.

The OKCPS wishes to enter into a long-term strategic partnership with a technology provider for the purpose of implementing, refining and supporting a state-of-the-art technology infrastructure that will provide world-class technology to the students and staff of OKCPS. The selected provider will work under the direction and supervision of the chairman for TCP.

The Strategic Technology Partnership agreement will include, but not limited to, E-rate funded projects. The selected vendor should be prepared to assist the district with all aspects of the E-rate process and should demonstrate knowledge and experience in dealing with E-rate funded projects. All E-rate applications will be submitted using the successful bidder's single SPIN number. Vendors must provide their SPIN number as part of this response. It is anticipated that the term of this partnership will be for a period of four (4) years, which will include a contract for the first year. There will be three (3) renewal option years with each option year to be awarded annually as a separate follow-on contract based on the previous year's performance. The decision to award an option year shall be based on the availability of funding for the fiscal year under consideration, school system needs, and vendor performance. The decision will be at the sole discretion of OKCPS. The performance of the technology provider on the previous year's scope of work will be measured against the Methodology for Measuring Results described in Section 3, Selection process, of this document.

The work itself will consist of all aspects of technology implementation for which OKCPS desires to contract with the partner. The current technology program calls for the installation of new technology equipment, software and services on an on-going basis.

59-OKC-233-

NOV 01 11:53

Oklahoma City Public School District
Request for Proposal #

2. GENERAL INFORMATION:

A. Eligible Offerors

An eligible offeror is, any firm that can demonstrate competence as a systems integrator in handling projects that are:

- * Complex in that solutions requiring the integration of multiple technologies, with the involvement of multiple vendors as subcontractors.
- * Long term with the management of projects that may span several years including the leadership required to successfully conclude projects on time and within budget.
- * The financial stability to cope with protracted federal payment practices.
- * That may require scalability of the workforce in the field to meet time deadline(s).

B. Response Format

Each response will be reviewed to determine if it is complete before evaluation. Any response not containing the information requested will not be considered. Responses will be evaluated according to the materials and substantiating evidence presented.

C. Legal Approach

Include a sample contract, Statement of Work (SOW), any existing pricing contracts available for use by OKCPS (GSC, TCPPN, Western States Contracting Alliance, or other), and all other documents that would become a part of the final contract. Pricing to include: rate card for services, planning and consulting pricing, and other pricing appropriate for this RFP.

3. SELECTED PROCESS:

A. Submission of Written Qualifications

OKCPS will review and evaluate the response to the RFP in accordance with the qualification evaluation criteria identified herein.

B. General Requirements of Each Offeror

Adherence to the requirements of this RFP,
Adherence to the OKCPS procurement process and,
Provide audited financial statements for the last two fiscal years.

C. Oral Interview

OKCPS reserves the right to conduct oral interviews with a select short list of firms to fully discuss their qualifications for this project and to answer questions posed by OKCPS Board of Directors. A final selection will be based upon the written response, oral evaluation, and references of the offeror. If an oral interview is required, notification will be provided to each finalist a minimum of five (5) days before the scheduled interview.

D. Selection of the Strategic Technology Partner

OKCPS will issue a Letter of Intent (LOI) to the most qualified firm as determined by OKCPS for this project. Under the LOI the recommended firm and OKCPS will negotiate a contract detailing commitments, guarantees, methodology for measuring results, termination procedures, fee structure, and any other legal requirement necessary to execute a contract. If an acceptable contract cannot be reached with the selected vendor within thirty (30) days, the next highest ranked vendor may be contacted.

E. Methodology for Measuring Results

Particular attention should be paid to the development of your methodology for Measuring Results. This will provide the basis of evaluation for award or non-award of the follow-on option years under this contract. Additionally, your Methodology for Measuring Results must be sure to include those concerns detailed in Section 5 Pricing Model and Cost Assurances.

4. OKCPS Current Technology Environment

The district supports 92 locations with a leased network provided by Cox Communications. The network is a logical star configuration where each site is connected to the district administration center using T1/25 communications over the Cox ATM layer. The administrative location provides access to the student records system, business system, Internet access and e-mail. The district is in the process of dividing its network into six processing hubs with a star configuration to the schools in each processing zone.

Voice and video communications as well as security and environmental systems use communications that is provided by Southwestern Bell Telephone Company. These are either point to point or Plexar trunk lines.

This year the district approved a technology plan that is focused on the classroom of the future. The plan addresses the curriculum improvements that can be achieved using technology as well as the infrastructure required to support an integrated telecommunications environment. Our vision is that Oklahoma City Public School District will be the nations urban leader in education within four years.

5. Criteria for Selection of a Strategic Technology Partner

OKCPS has identified the factors itemized in sections 5a to section 5g as critical to a company's ability to effectively assist OKCPS to infuse technology and better prepare students to be successful citizens and productive workers in the 21st century. To be considered for evaluation, companies must provide relevant responses to all sections of this RFP with particular attention to sections 5a - 5h (300 Evaluation Points Possible)

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB A

A. Availability and Quality of Resources (30 POINTS)

OKCPS is seeking a strategic technology partner that has the depth, breadth, and quality of resources necessary to complete all phases of a broad technology and service project. In addition, the timely availability of these resources and related support elements will be critical to project success.

- * Describe the various resources from your company that will be made available to assist OKCPS in the execution of its mission.
- * Indicate the availability of each resource, e.g., full-time, part-time, or as required.
- * Describe the methods available to bring resources to the district for both long terms and for rapid implementations.
- * Provide sample resumes and related experience summaries to demonstrate the competencies and experience of typical personnel who would be assigned to the OKCPS program.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB B

B. Staff Development and Training (20 Points)

OKCPS recognizes that a Staff Development plan, specifically designed to meet the needs and requirements of the school district, is essential to the success and growth of students, teachers and administrators.

A comprehensive staff development plan can offer services that will meet the needs of technology implementation. Describe how your company would implement an effective staff development and training program for OKCPS. Include a description of the training materials or training manual that would be produced and provided to OKCPS for future use in a "train the trainer" model. Also, describe your approach for class composition, class size, training location, instructors, scheduling, registration, etc.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB C

C. Project Management/Systems Integration (50 Points)

OKCPS requires a project management function as part of the services delivered by the strategic technology partner. Service providers must describe their competencies to manage and coordinate project activities, resources, and communications. Service providers must address their capabilities in areas to include but not limited to:

- * Project management methodologies and tools
- * Project planning and communications
- * Quality assurance procedures
- * Project management experience with large school districts
- * Project management experience as a single vendor or "prime" systems integrator
- * Methodology for measuring results

The strategic technology partner will work closely with OKCPS project manager to ensure successful project delivery, effective management of project resources and efficient communications between the service provider and OKCPS.

OKCPS requires System Implementation services to be included as part of those delivered by the strategic technology partner. OKCPS' continued transition to an integrated technology approach and migration to new technologies will require the selected provider to take an enterprise focus throughout project delivery. Service providers must describe their approach to systems integration and capabilities to provide these services to large student populations.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB D

D. Technology Solutions (25 Points)

OKCPS requires a network that will continue to provide the District with a modern, efficient and reliable network to support data and will eventually provide voice and video information transfer capabilities within and external to the member's district buildings. Reliability and high performance are key requirements of this networking plan, as the OKCPS network continues to migrate to the base, which must support the technology needs of the future.

This networking requirement includes, but not limited to, the following functional components.

- * Physical Infrastructure Plans for building wiring, fiber optic distribution (or leasing), wiring closets, patch panels, etc.
- * Logical network designs such as switches, routers, gateways, etc. including routing, protocols carried (LAN and WAN), and rationales for such selections.
- * Network and Distributed Systems management approach
- * Video distribution plans, including coaxial cable, fiber optics, studio equipment, switching and distribution equipment, satellite down links, and operational requirements.
- * Integration of Wireless technologies with legacy "wired" networks.
- * Installation of Hardware and Support
- * Asset management support for leased and purchased items.
- * Intranet and Internet access.
- * User training required to integrate these technologies into the curriculum and administrative process.

Please describe your approach, qualifications, and industry experience in the design and implementation of these network requirements in large school districts.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB E

E. Commitment to K-12 Education (20 Points)

The responding provider must demonstrate a commitment to the K-12 education market. OKCPS is interested in providers that understand the technology, administrative, and instructional challenges facing today's educators, children and administrators. A demonstration of the provider's K-12 commitment should include but not be limited to:

- * A description of your company's commitment to K-12 Education.
- * Examples of your company's activities as evidence of its commitment and support for K-12 Education.
- * Explanation of the size, type, and location of your company's relevant activities.
- * Description of your company's commitment to work with local contractors and business enterprises.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB F

F. District funding considerations (100 Points)

OKCPS requires each vendor to address possible assistance in securing funding for technology infusion throughout the school district. In addition OKCPS desires to understand the up front investment that must be made with district funds to be prepared to take advantage of other funding opportunities.

- 1.) Respond in general terms how such assistance will be provided and the funding sources expected to be utilized. Additional details should be provided in the following areas: (25 Points)
 - Describe in detail what the level of assistance might be provided
 - Provide a total amount of funding assistance anticipated for a sample configuration
 - Identify long-term considerations including the likelihood of multi-year funding assistance and the commitment of the vendor to provide such services to OKCPS.
 - Identify how much effort will be required by OKCPS in obtaining this funding.
- 2.) Specify the services available to the district for project planning, specialized program assistance, and other services provided to the district dealing with funding assistance. (25 Points)
- 3.) Specify the Costs to the District for all services discussed in the previous item (#2). (25 Points)
- 4.) Provide at least 3 references where the District/vendor partnership has been successful in securing funding for technology projects. (25 Points)

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB G

G. Pricing Model and Cost Assurances (25 Points)

As with any project, cost is a consideration. OKCPS understands that a strategic partnership as described in this RFP, does not allow for firm, fixed pricing in all areas, as the specific scope of work necessary for such pricing is impossible to ascertain. Prospective bidders should note that this RFP does not require, a firm fixed price, a cost plus proposal, or any other specific cost information with the exceptions of: a cost schedule for services and costs for Specialized Services for funding assistance. However, it is vitally important that OKCPS get value for its dollar in the other areas included in this scope of work and is able to demonstrate this to the OKCPS Board. Consequently, prospective bidders are required to provide a proposed pricing model that will:

- * Be able to demonstrate throughout the life of the contract that the costs associated with this partnership are within normal and customary charges for the type of services provided.
- * Be simple to administer as specific scopes of work are developed.
- * Meet all statutory requirements for record keeping reporting and auditing of public funds.
- * Adhere to district purchasing policy.
- * Be flexible in working within established budgets.
- * Provide the flexibility and services necessary to complete the anticipated project set (range of services).

Include a proposed schedule of hourly charges and/or other services based pricing, your company would normally use for a project of this scale.

Bidders are encouraged to provide any additional ideas, concerns or strategies for accomplishing the above.

It cannot be, over emphasized how important this criterion is to the potential success of any prospective bidders and your particular attention to providing a unique and workable implementation is strongly recommended. This criterion will be a major factor in evaluating the contractor's previous year's performance for determining the annual renewal/non renewal of this contract.

Contingent upon negotiations with the selected vendor, a specific price quote may be required upon completion of the final negotiated contract for the B-rate eligible projects. This information will be, submitted on OKCPS 471 application. Specific pricing will be required for any additional projects.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB H

H. Other Vendor Attributes (30 Points)

OKCPS has also determined that a company's background, experience, and financial stability are essential for the success of a long-term strategic relationship with its selected Strategic Technology Partner. In addition, the satisfaction of clients with the quality and cost effectiveness of services and products provided by the vendor is also critically important. Vendors responding to this RFP should include information about their company's experience, financial stability, and quality of services and products and satisfaction of their clients. A minimum of three (3) references must be provided. Preferred references would be other large school districts. Vendors must provide project scope and contract information.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB I

I. Proposal Evaluation Model

A committee designated to evaluate the response to this RFP will select up to three (3) vendors as finalists. The finalists may be required to present and answer questions regarding their RFP responses. The committee will select a single vendor to recommend as OKCPS Strategic Technology Partner from the finalists.

OKCPS reserves the right to select outright a Strategic Technology Partner, and to waive the finalists state of the evaluation process in the event a vendor has a total points scored significantly higher than all the other vendors responding to this RFP.

OKCPS in its sole discretion may accept or reject any or all responses to this RFP and may waive all formalities, technicalities and irregularities. All bidders are placed on notice that award of the RFP will be based upon the products and services best suited to OKCPS. The sole judgement of OKCPS on such matters shall be final.

Oklahoma City Public School District
Request for Proposal #

SEPARATE RESPONSE AND LABEL AS TAB J

**DOES YOUR OFFER COMPLY WITH ALL OF THE TERMS AND
CONDITIONS? IF NO, INDICATE EXCEPTIONS.**

**DOES YOUR OFFER MEET OR EXCEED ALL SPECIFICATIONS?
IF NO, INDICATE EXCEPTIONS.**

SEPARATE RESPONSE AND LABEL AS TAB K

NON-COLLUSION AFFIDAVIT

STATE OF OKLAHOMA)

COUNTY OF OKLAHOMA)

_____, of lawful age, being first sworn on oath says, that he/she is the agent authorized by the bidder to submit the attached bid. Affiant further states that the bidder to submit the attached bid. Affiant further states that the bidder has not been a party to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding; or with any state official or employee as to quantity, quality, or price in the prospective contract, or any other terms of said prospective official concerning exchange of money or other thing of value for special consideration in the letting of a contract; that the bidder/contractor had not paid, given or donated, or agreed to pay, give or donate to any officer or employee either directly or indirectly in the procuring of award of a contract pursuant to this bid.

Subscribed and sworn before me this _____ day of _____, 19____.

Notary Public (or Clerk or Judge)

SEAL

SEPARATE RESPONSE AND LABEL AS TAB L

BUSINESS RELATIONSHIPS AFFIDAVIT

Partnerships, joint venturer, or other business relationships that are in effect, or existed within one (1) year prior to this statement, with the architect, engineer, or other party to this project; or any such business relationships between any officer or director of the bidding company and any officer or director of the architectural or engineering firm or other party to the Project are as follow:

Subscribed and sworn to before this _____ day of _____, 19 _____.

Notary Public (or Clerk or Judge)

My commission expires: _____
(SEAL)

SEPARATE RESPONSE AND LABEL AS TAB M

NON-DISCRIMINATION CERTIFICATE

I, _____, do hereby certify that I am

the

_____ of the

_____ Corporation

I further certify that I have, this date, submitted a bid

to _____

_____ pursuant to the solicitation for Bids for

_____ dated _____

I certify that if I am the successful Bidder on this project, I will not discriminate against anyone in employment or employment practices because of race, creed, color, sex, or national origin, and that I will comply with all federal and state laws and executive orders concerning the subject of non-discrimination.

Subscribed and sworn to before this _____ day of _____, 19 _____.

Notary Public (or Clerk or Judge)

My commission expires: _____
(SEAL)

SEPARATE RESPONSE AND LABEL AS TAB N

INDEMNITY AGREEMENT

Contractor agrees to indemnify School District for any and all damages, loss and expenses which might result by reason of defective materials and/or workmanship in conjunction with the work to be performed under the contract between the parties. Contractor shall save and hold the School District harmless from all damages, loss and expenses occasioned by, or resulting from, any failure whatsoever of contractor to perform according to the terms of the preceding contract between the parties and contractor does agree to indemnify the School District for expense whatsoever occasioned by, or resulting from, any failure of the contract or to perform its obligations under the aforesaid contract.

NAME OF COMPANY

PRESIDENT

STATE OF OKLAHOMA)

) ss.

COUNTY OF OKLAHOMA)

Subscribed and sworn to before me this _____ day of _____, 19____.

Commission Expires: _____

Notary Public

SEPARATE RESPONSE AND LABEL AS TAB O

SEX OFFENDERS AFFIDAVIT (Contractor Requirement)

STATE OF _____)

COUNTY OF _____)

It is our understanding that an Oklahoma state law requires that no person working for my company who is also listed in the SEX OFFENDERS' REGISTER will be permitted to work On _____ (school district) property during the time when regular public school students will be in attendance for any reason. It is our understanding and we agree that is our duty to investigate to determine if any employee of ours is on said Register. It further our understanding and we agree that we will inquire of the school district as to which hours are those hours when regular public school students attend _____ (school) district site(s).

It is our understanding that failure to comply with this affidavit will result in immediate cancellation of our contract with _____ (school district).

Name of Contractor

Subscribed and sworn to before me this _____ day of _____, 2000

Notary Public

My commission expires:

(THIS AFFIDAVIT TO ACCOMPANY THE CONTRACT)

Attachment D: IBM Bid (Selected Pages)



IBM Response

to

Oklahoma City Public Schools

**Quotation
8839**

for

**Strategic Technology
Solution Provider**

November 19, 2001





2345 Grand Ave.
Kansas City, MO 64108

November 19th, 2001

Mr. Belphry Dean
Purchasing Dept.
Oklahoma City Public Schools
2500 NE 30th Street
Oklahoma City, Oklahoma 73111

Dear Mr. Dean:

IBM is pleased to respond to your Request for Proposal for a Strategic Technology Solution Provider. We have carefully reviewed the requirements outlined in your RFP and believe that we clearly understand the business goals and objectives that drive your initiative.

As you will see in our proposal, we have assembled a world-class team of experienced professionals as part of our solution for this most important partnership. Our team will utilize the services of IBM Technology and Industry Experts with broad experience in assisting K-12 organizations with e-rate strategy, technology integration, infrastructure, implementation projects, etc.

Inquiries or other correspondence related to the IBM response, should be directed to Daryl E. Williams at 713-940-1370 or dwillia1@us.ibm.com.

Thank you for considering IBM as your Strategic Technology Solution Provider. We look forward to the opportunity to expand our relationship as Partners in Education.

Sincerely,

Daryl E. Williams
IBM Senior Client Executive

Tab G

5.G Pricing Model and Cost Assurances

IBM Global Services is the largest consulting and services provider in the world. We have become the largest because our many clients have received significant value for the services we have provided. Our client satisfaction ratings are the highest in our industry, which results in a very high percentage of our business being repeat business from existing clients. Clients award IBM follow-on projects because their previous experience has demonstrated to them that IBM consultants are highly competent, professional, and worthy of their confidence. All of this is true, because of the people we have in our organization. They are the most qualified and competent professionals in the industry. IBM costs and prices reflect this professionalism and competency.

IBM conducts periodic (at least annually) market studies to compare our rates with those of our major competitors, and implements pricing strategies that make us competitive with them. You are assured that IBM prices will always be market driven, competitive with other consulting firms of similar profile and skill levels, and within normal and customary charges for the type of services provided. IBM Global Services pricing model, and therefore customer costs, are based upon the following factors:

- Resource costs,
- Expected profit margins, and
- Project risk factors.

Since the IBM Corporation must return a profit to its investment owners, the first consideration in pricing is earning that expected margin over our costs. Those margins are consistent with our competitors in the consulting and systems integration business.

Professional fees for project resources are determined by IBM's cost of those resources. As expected, consultants and project managers earn higher rates than the less experienced staff. Thus, the cost of any project will be determined by the number, mix and skill level of the resources required to perform the project. IBM will always attempt to identify the most cost-effective resource with the capabilities to perform the project tasks. Thus, IBM will engage sub-contractors to perform many development and installation activities, because they often have resource costs that are less than IBM's.

The only additional factor influencing our prices to clients is the assessment and assignment of project risks. All project risks have costs associated with them. Therefore, the more risk that IBM assumes, the project costs will be higher. The more risk OKCPS assumes, the lower the IBM cost will be for our services. The most significant contributor to the risk factor is whether IBM assumes the risk of time and resource requirement, by offering OKCPS a "fixed" price for

our services. If an hourly rate based upon our estimates of project effort is acceptable to OKCPS, and thus OKCPS assumes the risk of time and resource, the IBM price will be less.

Since the IBM pricing model is very simple, the cost associated with any Statement of Work is easily determined. The only inputs necessary to determine a price are: length of project, number and type of project resources required, and determination of IBM's risk assumption.

IBM recognizes the importance of disciplined and auditable accounting and business practices. As a publicly owned company IBM is subject to very demanding accounting audit standards. All IBM systems and processes are designed to protect the corporation, and our clients, from improper or unauthorized business transactions. The same high standards of performance are expected of all IBM employees. IBM takes great pride in the integrity and professionalism of its staff.

IBM will be flexible in working within OKCPS established budgets. We recognize the challenges of the annual budget process, and will work with the OKCPS staff to plan projects and expenditures within that budget process. The Strategic Technology Integration Partnership contract is offered for one year, with the option to renew it for subsequent annual terms. Additionally, any IBM contract is subject to cancellation by the client at any time.

Schedule of Hourly Charges

IBM Services Rates

The following rates are based on individual skill and experience levels for IBM personnel that are utilized to deliver technology services as defined in this response. Specific resources will be assigned based upon the services required. Additional disciplines may be engaged that are not listed below, but they would fall under one of the listed rates.

Resource	Hourly Rate
Service Technician Level 1	\$55.00
Service Technician Level 2	\$70.00
Service Technician Level 3	\$99.00
Service Technician Level 4	\$125.00
Service Technician Level 5	\$145.00
Service Technician Level 6	\$185.00
Service Technician Level 7	\$260.00
Service Technician Level 8	\$295.00
Service Technician Level 10	\$395.00

Value: Total support services flexibility with respect to:

- Mix of required skills and skill levels over the course of the engagement
- Blended, discounted manpower rates
- Charged monthly only for man-hours used, while locking in preferred rates for a specific period of time

Note: The hourly labor rates quoted are for the calendar year 2002. They are subject to change.

Attachment E: E-Rate Central Tips

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Form 470 Application Tips

Introduction:

FCC Form 470 "Description of Services Requested and Certification Form"

The first form that must be filed by a school or library in the E-Rate application process. Its primary purpose is to briefly describe the applicant, provide a point of contact, and indicate any new telecommunications and technology services that the applicant will be seeking. Much of the information requested is designed to be useful to, and to be made available to, potential vendors.

The important aspect of submitting a Form 470 is that it be filed well before actual contracts, upon which E-rate discounts will be requested, are signed. Specific discount requests will be made on a second form, FCC Form 471, which should be filed before the end of the application window period for the next funding year. The Form 471 application window for the 2003-2004 year will close February 6, 2003. Timing is important because, before new contracts can be signed, the initial Form 470 must be received by the SLD and posted on its Web site for at least 28 days.

The rules for determining the eligibility of existing and new contracts for E-Rate purposes are quite precise and must be carefully followed.

A more complete discussion of these rules and the implications for applicant purchasing procedures is provided under [Contracting Procedures](#).

Form 470 Instructions:

Detailed instructions for completing a Form 470, either online or by mail, can be found:

- In the [Forms Rack](#) section of this Web site.
- In the [SLD Forms](#) section of the SLD Web site.

Interactive versions of Form 470 (and other E-rate forms) are available in several formats in the [Forms Rack](#) section of this Web site. These versions can be used online or can be downloaded for subsequent use. The PDF format provides various levels of use, depending upon which Acrobat reader is used. For best results, we suggest using Adobe Acrobat 4.0 (or later).

Form 470 Application Tips:

Tip 1: Make sure to use the current version of Form 470.

Tip 2: Entity Numbers are required to identify both billed and non-billed entities.

Tip 3: Give careful consideration to the choice of the listed contact(s).

Tip 4: In Block 2, be as broad and inclusive as possible in summarizing needs or service requested.

Tip 5: Suggested language for Item (12).

Tip 6: Item (13) is truly optional.

Tip 7: Suggestions for completing Block J: Technology Assessment.

Tip 8: School districts, library systems, and consortiums must fill out Block 4 carefully.

Tip 9: Carefully complete the certifications and sign and date the application.

Tip 10: Carefully note the Form 470 Application # assigned by the SLD.

Tip 11: Filing Form 470 online or mailing it directly.

[Click here for examples of Services to be listed on the Form 470.](#)

[Click here for information on filing Form 470 online, or mailing it directly.](#)

Tip 1:

Make sure to use the current version of Form 470.

- The current version is dated April 2002. Check the date at the bottom right-hand corner of each page. If filing Form 470 on-line, use of the current version will be automatic.

[To Tips](#)

Tip 2:

Entity Numbers are required to identify both billed and non-billed entities.

- The "Entity Number" in Item (3) used to be called the "Billed Entity Number."
- First time applicants can be assigned Entity Numbers by calling the SLD help line, 888-203-8100.

[To Tips](#)

Tip 3:

Give careful consideration to the choice of the listed contact(s).

- The contact person listed on page one, Item (6), should be responsible for responding to questions from the SLD on the application. If someone else is best equipped to handle inquiries from vendors, that person should be listed as the optional contact on page three, Item (11).
- To best way to try to manage contact with vendors responding to a Form 470 application is to select "FAX," "E-mail," or even "Mail," rather than "Telephone," as the "preferred mode of contact." Our experience, however, is that vendors (and the SLD) don't always honor this preference.

To Tips**Tip 4:****In Block 2, be as broad and inclusive as possible in summarizing needs or service requested.**

- If, at the time of filing a Form 470, an applicant is not sure whether service might be received under a tariff or contract, check both options in Item (7). Many applicants may need to check Items (7a), (7b), and (7c).
- *Note that "tariff" has a specific connotation applying only to regulated telecommunications services. "Month-to-month" services is a new category that may be narrowly interpreted by the SLD to apply only to certain Internet access, cellular telephone, and paging services. All other services must be provided under contract.*
- For Items (8) - (10), it is not possible to check both "YES" and "NO" if an RFP is available for some portion of the service, but not for all. In such a case, it is better to check "NO" and to list all services required, including those covered by the RFP.

[Click here for Examples of Services to be listed](#)To Tips**Tip 5:****Suggested language for Item (12).**

- Most NYS public schools can use the following language:

"Public work and purchase contracts for public schools in New York State are governed by the provisions of Sections 103-109 of the State's General Municipal Law. Public schools may also purchase equipment and services under publicly bid centralized procurement contracts administered by the State's Office of General Services or under cooperative bidding contracts administered by local boards of cooperative educational services ('BOCES')."

- Even simpler language is appropriate for most libraries and private schools.
- An applicant filing its Form 470, several months or more before it plans to negotiate and sign contracts for requested services, should include language such as:

"Bids for services requested herein will be accepted up to and until the close of the next E-rate Form 471 application window."

To Tips

Tip 6:

Item (13) is truly optional.

- Complete only if you want to encourage vendors to contact you regarding possible future services.

To Tips

Tip 7:

Suggestions for completing Block 3: Technology Assessment.

- Avoid checking "Basic telephone service only" in Item (14) unless you are sure that is the only service you need. "Basic telephone service" refers only to individual telephone lines and cellular telephone service.
- Item (15) is easy to complete. When in doubt, check both "has been purchased" and "is being sought."
- Item (15f) is truly optional.

To Tips

Tip 8:

School districts, library systems, and consortiums must fill out Block 4 carefully.

- At a minimum, all applicants must check one of the categories in Item (16) and complete one line in Item (17).
- School districts, library systems, and consortiums must complete the table associated with Item (16c) by entering the number of eligible sites (e.g., school district buildings) and the area code(s) and central office exchange codes (the first three digits of the local telephone numbers) of all sites covered by the application.

To Tips

Tip 9:

Carefully complete the certifications and sign and date the application.

- Both the FCC and the SLD take these certifications seriously and so should the applicant. Be prepared to support a review of the Item (23) certification that conditions E-Rate funding on the availability of supporting equipment and services.
- Remember that, even if the Form 470 is completed online, the signature page must be mailed to the SLD before the end of Form 471 application window.
- It is suggested that all forms and certifications sent to the SLD be made by registered or express mail so that a receipt can be obtained proving delivery. Delivery for most express mail services can be tracked on the service's web site.

To Tips

Tip 10:**Carefully note the Form 470 Application # assigned by the SLD.**

- In the program's first two years, the application number was known as the USCN, or Universal Service Control Number.
- When submitting a Form 470 online, the Application # will be assigned early in the process. If the Form 470 is not completed in one online session, the Application # serves as the key to resuming entry.
- When submitting a Form 470 by mail, the SLD will send back a receipt acknowledgment letter containing the Application # after data entry.
- The Application # will be required in Item (12) of Form 471 for each Funding Request.
- The Form 470 is an "Evergreen" form. Services originally posted on the Form 470 in one year, then provided under a multi-year contract, need not be posted again on a Form 470 until the contract comes up for renewal. When requesting a discount on a Form 471 under a multi-year contract, the Application # in Item (12) should be the number of the original Form 470 filed prior to negotiating the contract.

To Tips

Tip 11:

- **[Click here for information on filing Form 470 online or mailing it directly.](#)**

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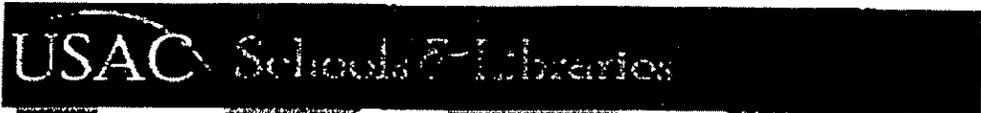
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Updated: Tuesday, 10-Dec-2002 8:37

Form 470 - Block 2 Examples

Service or Function	Quantity and/or Capacity
Telecommunications – Item (8)	
Local and long distance voice services	50 existing or new phone lines
Cellular/PCS services	20 existing or new users
Paging services	25 existing or new users
High-speed access (ISDN, T-1, OC3, etc.)	5 buildings (wired or wireless)
Videoconferencing links	5 buildings
Internet Access – Item (9)	
Dedicated access services	5 buildings (wired or wireless)
Dial-up services	25 user accounts
Internet access service routers	5 buildings
Internal Connections – Item (10)	
New or upgraded LAN network	5 buildings (wired or wireless)
New or upgraded telephone systems	5 buildings
LAN and/or telephone system maintenance	5 buildings
Video distribution equipment	5 buildings
Internet access service routers	5 buildings

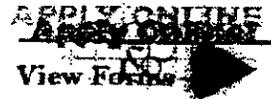
Attachment F: SLD Tips



[Site Tour](#) | [FAQs](#) | [Contacts](#) | [Get Help!](#)

Reference Area

- [SL Overview](#)
- [Applicants](#)
- [Service Providers](#)
- [Reference Area](#)
- [SL Forms](#)
- [Data Requests](#)
- [Funding Commitments](#)
- [Site Map](#)
- [PIN Request Area](#)



Search Site

Enter Keyword

Get the most out of your search query by viewing [Search TIPS!](#)

Tips for Completing Your Form 470

- Tip 1. File Form 470 Online**
- Tip 2. File Form 470 Any Time During the Program Year**
- Tip 3. Only File ONCE for Each New Contract, and File Annually for Tariffed and Month-to-Month Services**
- Tip 4. Review the Minimum Processing Standards for the Form 470**
- Tip 5. Remember the Technology Plan Requirement**
- Tip 6. When an Request for Proposal (RFP) is Available**
- Tip 7. Online Filers: How to Successfully Submit your Form 470 Online**

Tip 1. File Your Form 470 Online – Using the online Form 470 for filing your E-rate application saves time and minimizes data entry errors. The SLD system validates the answers you data enter for each item, which means your application is less likely to need extensive problem resolution clean up. Form 470 applications that are successfully filed online also post faster to the SLD web site. You may access the online Form 470 by clicking the "Apply Online" button on the [SLD web site](#).

Tip 2. File Your Form 470 at Any Time During the Program Year –You may file the Form 470 at any time during the program year. In other words, there is not a limited timeframe (or "Window Filing Period") for submitting your Form 470 to the SLD. This allows you greater flexibility in initiating procurement processes while still allowing you to comply with E-rate competitive bidding requirements.

For Year 4, your Form(s) 470 must be posted early enough to achieve the 28-day posting period before filing and signing the Form 471, Block 6, Certifications and Signature which must be

postmarked no later than January 18, 2001 in order to be inside the Year 4 window.

Tip 3. Only File Form 470 ONCE for Each New Contract, and File Form 470 Annually for Tariffed and Month-to-Month Services – Multi-year contracts require only one Form 470 to be filed when procurement begins. Each Form 470 has a unique number, to which you will refer in your annual Form 471 applications. PLEASE NOTE that you must file a Form 470 each year for discounts on tariffed services, such as telecommunications services, and for discounts on services billed on a month-to-month basis, such as some internet services and cell phone service.

Tip 4. Review the Minimum Processing Standards for the Form 470 – The Minimum Processing Standards (or MPS) are the procedures that the SLD uses to review your application when w it is first received. Your application must pass the Minimum Processing Standards in order for data entry of your application to begin. Be sure to review the Form 470 Minimum Processing Standards and Filing Requirement posted in the Reference Area of this web site.

Tip 5. Technology Plan Requirement – Don't forget that you must have an approved technology plan (or be seeking approval on a technology plan) when you file the Form 470. The only exception to this rule is if you are applying for discounts only on basic local and long distance telephone service and for no other services. In that limited case, you are not required to complete and obtain approval of a technology plan.

Tip 6. When a Request for Proposal (RFP) is Available – If you are applying for E-rate discounts and you have developed a Request for Proposals (RFP) specifying the services you are seeking, you do not need to detail these services on the Form 470. In Block 2, Items 8 or 9 or 10, simply check box A and include the URL (web site address) where your RFP is posted, OR check box B and indicate which person to contact to obtain the RFP.

Tip 7. Online Filers: How to Successfully Submit your Form 470 Online – Follow these simple steps to make sure your Form 470 is successfully submitted to the SLD:

1. After you have completed each block, print a copy of the screen for your records.
2. Provide the appropriate answers in Block 5, Items 19-29
3. Print a copy of this screen for your records.
4. Click the "Next" button to move on to the next page, which features special instructions.
5. On this special instructions page, read all the instructions and then click the "Next" button at the bottom of the screen. By clicking "Next" you are simultaneously releasing your completed application to the SLD for posting, AND viewing a complete version of Block 5 of your Form 470. This version represents the Block 5 information as it

appears in the SLD database. Clicking "Next" will prevent any further changes to the application. Please be sure that you are satisfied that all entries to the Form 470 are correct and you are fully authorized to release this form for posting before clicking "Next" on this page.

6. Print a copy of this Block 5 Certification and Signature page, ask the authorized person to sign Item 25 with an original ink signature, and submit it to the SLD either manually, by mail, express delivery or U.S. Postal Service Return Receipt Requested.

For regular mail, submit Form 470 to:

SLD - Form 470
P.O. Box 7026
Lawrence, Kansas 66044-7026

For express delivery services or U.S. Postal Service, Return Receipt Requested, submit Form 470 to:

SLD - Form 470
C/o Ms. Smith
3833 Greenway Drive
Lawrence, Kansas 66046
(888) 203-8100

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