

Board Agenda E-rate Consulting

Jim Cox

Thu 10/29/2015 12:35 PM

Inbox

To: Melanie Kerber <kerberm@bsd.k12.pa.us>;

Cc: Missy Delmonico <delmonicom@bsd.k12.pa.us>;

 1 attachment (806 KB)

Blackhawk School District 2016-2017 E-Rate Services Proposal.pdf;

Proposal for board approval:

Approval is recommended to approve CSM for e-rate consulting services for the 2016-2017 school year at approximately \$4,000 for category 1 funding and 6% of category 2 applications submitted not to exceed 10,000.

The Category 1 fee is the same as our consultant last year; however, Category 2 is a change to the e-rate process that allows school districts to apply for reimbursement for internal equipment that support high speed internet access. Blackhawk will be eligible for a 50% - 60% reimbursement on equipment that would normally be budgeted. The 6% fee is for the legalities and paperwork of the application, bid, and acceptance process. An example would be if we budgeted for \$30,000 in infrastructure equipment and updates we would be reimbursed \$15,000 (assuming our discount is 50%) but would need to pay \$1,800 to the consultant to handle the associated legalities and paperwork.

The website for the consulting company is listed below and I have attached their proposal for review.
<http://csmcentral.com/>

Please let me know if you have any questions.

Jim Cox

Director of Technology

Blackhawk School District

(724)-846-6600



BLACKHAWK SCHOOL DISTRICT
Proposal for
2016/17
E-Rate Consulting Services

**WITH CSM'S PROFESSIONAL E-RATE
CONSULTING SERVICES THERE WILL BE:**

- No Missed Opportunities.
- No Missed Deadlines.



OUR COMMITMENT

CSM is committed not only to our clients' best interests, but also to being responsible stewards of the E-Rate program as a whole.



FIND US ON THE WEB
WWW.CSMCENTRAL.COM.



CALIFORNIA OFFICES

(888) 944-7798 | **Ontario**
(949) 547-4087 | **Laguna Hills**
(209) 834-0556 | **Tracy**
(888) 944-7798 | **Bakersfield**
(530) 676-1024 | **Sacramento**

TENNESSEE OFFICE

(909) 652-9104 | **Nashville Area**

MARYLAND OFFICE

(888) 944-7798 | **Baltimore Area**

FLORIDA OFFICE

(888) 944-7798 | **Tallahassee**



E-Rate Services Proposal

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EXECUTIVE SUMMARY

It is our pleasure to present this summary of services to Blackhawk School District. The enclosed information will demonstrate clearly why we are the best choice for your District on several levels.

Our depth of knowledge, our position as a trusted partner in our clients' successes, and our absolute diligent dedication has and will continue to set us apart from other firms. Every member of our staff is highly trained and qualified to answer any question at any time. At CSM, we pride ourselves on the reputation that we have built over the last several years and our ability to communicate effectively with not only our clients, but with the various administrative bodies that oversee the Universal Service Fund's Schools and Libraries Program. We consider ourselves to be stewards of the program and accountable for maintaining the integrity of the fund, our firm, associated participants and, most importantly, our clients. CSM's Vice-President Kim Friends has been a Board member of the E-Rate Management Professionals Association (E-MPA™) and our firm abides by its Code of Ethics. Additionally, we have five staff members who have qualified as "Certified E-Rate Management Professionals."

Most recently, CSM was selected by the Tennessee Department of Education as Tennessee State E-Rate Coordinator. CSM provides outreach and training to applicants across the state, representation to federal policymakers, and expertise in all matters E-Rate. It is an opportunity that CSM has been honored to accept and demonstrates the high regard by which CSM is held across country.

CSM's principal E-Rate consultants have been involved with the Universal Service Administrative Company (USAC)'s E-Rate program since its inception. With backgrounds at the county office of education level, and at several large school districts, our consultants understand the complexities of working with Local Education Agencies. CSM's staff also includes the former Ombudsman for the USAC Schools and Libraries Division as well as a former Selective Reviewer at Solix. Over the 18 years of the E-Rate program, CSM consultants have secured more than \$2 Billion in approved E-Rate funding for Priority One and Priority Two services and applied for over \$287 Million in Category One and Category Two Funding for our customers in Funding Year 2015.

CSM's Vice President Kim Friends has established herself as one of very few premier E-Rate consultants in the Country. Her diligence and expertise allows CSM a direct line to USAC's office in Washington, D.C. for problem resolution and/or clarification. At USAC's request, CSM personnel were instrumental in the development and deployment of the online BEAR processing system and are called upon for opinion by USAC, NECA, Solix and FCC staff on a regular basis. CSM regularly and actively participates in the FCC's request for comments and reply comments as a part of their Notice of Proposed Rule Making ("NPRM") proceedings and was cited as commenter of record in both the *Sixth Report and Order*¹ and the *E-rate*

¹ The *Sixth Report and Order* can be found at <http://www.usac.org/res/documents/sl/pdf/6th-Report-and-Order.pdf> CSM citations are at pages 19, 20, 24 and 29. CSM's comprehensive comments can be found at <http://fjallfoss.fcc.gov/ecfs/document/view?id=7020520477>

Modernization Order which established the framework for “E-rate 2.0.”² Participation in these proceedings has and will continue to establish CSM’s reputation as a firm committed not only to our clients’ best interests, but those of the E-Rate program as a whole.

CSM has been involved in numerous audits conducted not only by FCC-retained auditors (KPMG, Williams Adley, Price Waterhouse Coopers, TCBA, Moss Adams, Lani Ecko and Bearing Point), but also USAC’s internal audit staff and the FCC’s Office of Inspector General (OIG) audit staff. In addition, CSM staff members work directly with the Tennessee Educational Technology Association (“TETA”) and the California Department of Education’s E-Rate Focus Group to develop and present annual training seminars, offer guidance, and resolve issues on both state and federal levels.

CSM has been involved in assisting several applicants who have had problematic applications in the past to bring them to compliance and achieve success with the program. This is done, in part, by leveraging the reputation that we have built on a national level with reviewers and other USAC staff when processing applications.

CSM’s consultants bring the expertise, dedication and tenacity required for success in the E-Rate program. We also highly value the long-standing relationships we have built with our customers. We encourage you to contact our references to see what CSM brings to the table in terms of customer service and sustained funding year after year. It would be a true pleasure for us to work with Blackhawk School District and we look forward to answering any questions you may have about our service and track record.

² The *E-rate Modernization Order* may be found at https://apps.fcc.gov/edocs_public/attachmatch/FCC-14-99A1.pdf. CSM citations are at pages 53, 60, 62, 84, and 85. CSM’s comments may be found at <http://apps.fcc.gov/ecfs/document/view?id=7520944085>

COMPANY PROFILE

CSM Consulting Inc., Established 2004

Billing Address:

P.O. Box 4408
El Dorado Hills, CA 95762

E-rate Primary Contact:

Kimberly Friends, kfriends@csmcntral.com
909.652.9104 (one number reach)

Primary Offices:

Ontario, California
3130-C Inland Empire Blvd.
Ontario, CA 91764
909.944.7798 Phone
909.481.7410 FAX

Tracy, California
324 East 11 Street, Suite E-3
Tracy, CA 95376
209.834.0556 Phone
209.834.0087 FAX

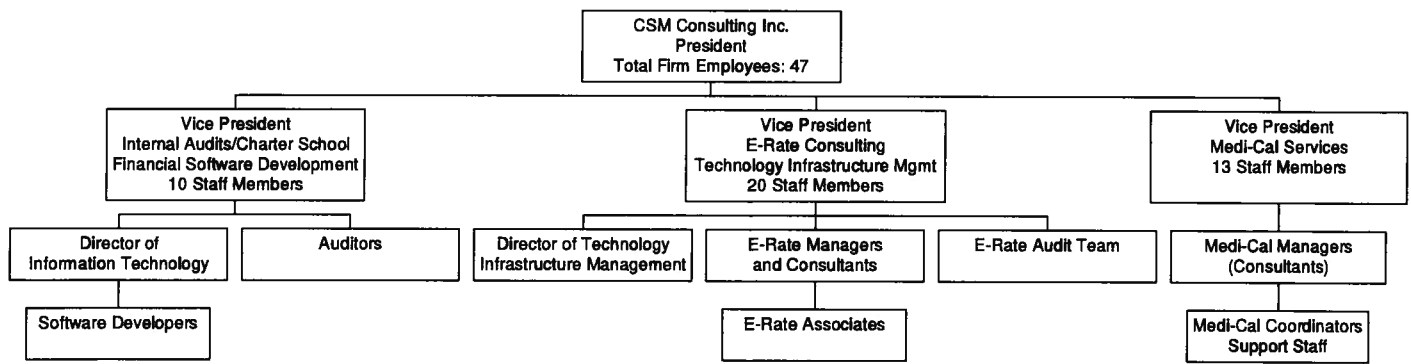
Sacramento, California
4671 Golden Foothill Pkwy, Suite 101
El Dorado Hills, CA 95762
888.944.7798 Phone
916.941.7234 FAX

Satellite Offices:

Redding, California
Laguna, California
Hendersonville, Tennessee
Baltimore, Maryland
Tallahassee, Florida

CSM is one of the most highly respected consulting firms in the Nation. Our management and staff have been involved with K-12 local agencies in California for over thirty years, providing our clients with a powerful partner in the business of education. CSM's key lines of business include E-Rate consulting, technology infrastructure management consulting, internal audits, charter school monitoring, and financial software development.

CSM Consulting Inc. Organization Chart



RÉSUMÉS OF KEY PERSONNEL

Kimberly Friends - Vice President (Nashville, TN)

Kim Friends is a nationally recognized expert in the Universal Service Administrative Company's E-Rate program. Ms. Friends participated in the ground floor of the program, training school districts throughout San Bernardino County to effectively and efficiently take advantage of the funds provided through the reauthorization of the Telecommunications Act of 1996. Ms. Friends joined CSM in 2003 and serves a large number of school districts and county offices of education in her role as an E-rate expert. Ms. Friends has participated as a statewide trainer for the California Department of Education, various major telecommunications carriers, and county offices of education. Kim currently acts as the State E-rate Coordinator for Tennessee, and is an active member of the State E-rate Coordinators Alliance ("SECA") an advocacy group that works consistently on behalf of E-rate issues affecting applicants nationwide. She intimately understands the E-Rate process and program and is considered one of the very few *premier experts* in her field.

Cathy Benham – Director, Pre-Commitment Operations (Ontario, CA)

Cathy Benham has worked with Local Educational Agencies and their representatives for more than 15 years in the areas of state and federal programs and program compliance. Mrs. Benham brings over 25 years of management experience overseeing and executing multi-million dollar projects. She currently oversees the E-Rate department in the Ontario office, working with a large client base. Cathy is a statewide trainer for California Department of Education's E-Rate Focus Group. She also participates in the State Consortium Group, representing California's interests in its E-rate application for the state's high speed network (CAL-REN), and the State E-rate Coordinators Alliance. She is one of the select few Certified E-rate Management Professionals in the country, certified by the E-rate Management Professionals Association. Mrs. Benham is intimately involved with every aspect of the E-Rate process, from planning to execution to collection of approved E-Rate funds, and ensures CSM's clients receive the highest level of customer service.

Paul Stankus – Manager, E-rate Compliance (Washington, DC)

Paul Stankus is CSM's Manager of E-rate Compliance. Previously he worked for nine years at USAC, mostly in the Ombudsman office where he solved difficult E-rate cases for applicants around the country. He is based in our Mid-Atlantic Regional office near Washington, DC.

Aldolfo Aruaz – Senior Consultant (Tallahassee, FL)

While his first professional experience was at Wall Street financial giants like Bankers Trust, Chase Bank and Fidelity Investments, Adolfo (Al) Aruaz brings well over a decade of E-rate background to the position.

A 1989 graduate of Syracuse University's Maxwell School of Citizenship and Affairs (Economics & Spanish Literature), Al spent the 1990s working for those aforementioned custodian banks and brokerage houses. But since early 2002 his journey has run the gamut of the E-rate program. Starting in USAC Program Integrity Assurance and quickly establishing himself as a USAC Selective Reviewer for half a decade, Al moved on to the Consulting field. Equipped with this program experience, Al then moved to the Southeast to work at the Florida Department of Management Services where he was one of two State E-rate Coordinators servicing the entire state. It was at this juncture that he successfully filed for

three years of E-rate funding for all 13 E-rate eligible State Master contracts and simultaneously served as the E-rate advocate for Florida's applicant community.

Scott Harken – Director, Post-Commitment Operations

Scott has 11 years of experience with all phases of the E-Rate Program and 15 years of experience working with school districts in state and federal program compliance. He manages our client access software which allows CSM's clients access to real-time information on all of their E-Rate applications, past and present. He is integral in support of the ongoing application processes including PIA review and documentation retention.

Shawn Farley - Manager, Post-Commitment (Reimbursement/Discounts)

Shawn brings a wealth of regulatory and compliance knowledge to CSM's E-Rate staff and allows a unique perspective when working through issues involving both the applicant and the service provider. Mr. Farley is an integral part of the E-Rate team at CSM and in ensuring successful receipt of approved funding.

Drulynn Vang – Manager, Quality Control

Drulynn has been a member of the CSM team for seven years. Her overall knowledge of the program and attention to detail has been invaluable to our group and the clients that she works with. Drulynn brings a dedicated and unequalled approach when working through many issues involving both the applicant and the service provider. She is an integral part of the E-Rate team at CSM and in ensuring a successful application process on all levels.

STATEMENT OF QUALIFICATIONS

The following statements reflect the reasons that we believe CSM to be most highly qualified to support Blackhawk School District ("BSD").

1. Experience – 350+ E-rate clients nationwide.
2. Depth - The principles assigned to BSD have a combined experience in school districts of over 30 years.
3. Commitment to our clients is second to none.
4. Independent – CSM is an independent consultancy without relationships to any contractors or service providers.
5. Technology expertise in addition to E-rate application expertise.
6. Technology tools – CSM uses the latest in proprietary software to assist in the E-rate application process for our clients.
7. Unique relationship with USAC and the FCC.

In the past eleven years, CSM has grown from a client base of 13 to more than 350 clients.

FY 2011 Applications (Priority Two Funded to 88% only)

- \$292,422,306 committed
- 2,751 Funding Requests filed

FY 2012 (Priority Two Funded for 90% applicants only)

- \$321,506,707.23 committed
- 3,010 Funding Requests filed

FY 2013 (Priority Two Unfunded Nationwide)

- \$186,656,466 committed
- 3,548 Funding Requests filed

FY 2014 (Priority Two Unfunded Nationwide)

- \$181,613,943 committed (to date)
- 3,040 Funding Requests filed

FY 2015 (Category Two to be Funded Nationwide)

- \$287,087,687 requested
- 3,938 Funding Requests filed

CSM is widely considered to be one of the Nation's largest and most trusted E-Rate consulting firms. We work with applicants of every size and flavor from a very small rural district with only 21 students, six of the 20 largest school districts in the Country and every size, shape and complexity in between.

REFERENCES

Jeremy Recktenwald, Director IT Services and Support <u>San Diego Unified School District</u> 619-260-5499 jrecktenwald@sandi.net	Ricardo Enz, Director of ITC <u>Santa Ana Unified School District</u> 714-480-4702 ricardo.enz@sausd.us
Rick Rodriguez, Director Information Systems <u>Garden Grove Unified School District</u> 714-663-6591 rrodrigu@ggusd.us	Carl Fong, Executive Director of Information Technology <u>OC Department of Education</u> 714-966-4185 cfong@ocde.us
Ed Smith, Project Management <u>CENIC</u> 714-220-3453 esmith@cenic.org	Erik Greenwood, CTO <u>Anaheim Union High School District</u> 714-999-5676 greenwood@auhsd.us
Greg Lindner, CTO <u>Los Angeles County Office of Education</u> 562-922-6463 Lindner_Gregory@laoe.edu	Derek Kinsey, CTO <u>Redondo Beach School District</u> (310) 379- 5449 dkinsey@rbusd.org
John Vinke, Deputy Superintendent <u>Lawndale School District</u> 310-973-1300 x50026	Bob Blackney, Administrator of Technology and Assessment <u>Azusa Unified School District</u> 626- 967-6211 bblackney@azusa.org
Ashton Potter, Director of Technology & Information Services <u>Alhambra Unified School District</u> 626-943-3030 potter_ashton@ausd.us	Jason Buchanan, CTO <u>Monrovia Unified School District</u> 626-471-2015 jbuchanan@monroviaschools.net

INSURANCE

CSM does carry Errors & Omissions Insurance in the amount of \$2,000,000.00 each occurrence and \$4,000,000.00 aggregate.

Our Producer is
Kessler Alair Insurance Services
PO Box 1120
Claremont, CA 91711-1120
888.661.3938

If selected, CSM will provide Certificates of Insurance for all types of insurance required by BSD with Blackhawk School District named as additional insured.

SCOPE OF SERVICES OVERVIEW

1. **Funding Year 2016 Form 470 and Procurement Planning**
 - a. Kick-off meeting to be conducted with stakeholders
 - b. Review of Services and Contracts
2. **Form 470 Posting and Review of Request for Bid/Proposal**
3. **Data Collection for Form 471 and Review of Compliance with Children's Internet Protection Act (CIPA)**
4. **Form 471 Preparation**
 - a. **Form 471, Block 4: Calculation of E-Rate discounts, Category Two Budgets.**
 - b. **Form 471, Block 5: Funding Requests**
 - i. Cost review of current services
 - ii. Funding requests for new services
 - iii. Form 471, Block 6: Budget documentation
 - iv. Contract execution
 - v. Documentation for Item 21 Attachments
5. **Form(s) 471 Filing**
 - a. File Form(s) 471:
 - i. **Category One Services (Telecommunications/Voice/Internet Access)**
 - ii. **Category Two Services (Internal Connections/Managed Internal Broadband Services/Basic Maintenance of Internal Connections)** – Note that Category Two services are subject to an additional fee from Base Contract
6. **Program Integrity Review (PIA)**
7. **Filing of Form(s) 486 Upon receipt of the Funding Commitment Decision Letter (FCDL)**
8. **Collection of E-Rate Funds**
 - a. **Service Provider Forms necessary for Discounts on Service Provider Bills**
 - b. **Billed Entity Applicant Reimbursement (BEAR) Form 472**
 - c. **Service Certifications**
9. **Audit of Category One Service Provider Invoices**
10. **Reviews and Other Post Commitment Activities**
 - a. **Payment Quality Assurance (PQA)**
 - b. **Other Post-Commitment Activities**
 - i. Service substitutions
 - ii. SPIN changes
 - iii. Form 500
 - iv. Invoice Deadline and Service Delivery Extension Requests
11. **Additional professional services available at an hourly fee**
 - a. Selective Reviews, Special Compliance Reviews, BCAP Audits, and Appeals
 - b. Training, Speaking Engagements, Special Meetings and Advocacy
 - c. RFPs and Procurement Assistance
 - d. Technical Assessment and Preparation of Specifications
 - e. Technology Plan and Technology Plan Addenda preparation
 - f. Recovery of previous year's undisbursed funding requests

STANDARD SCOPE OF SERVICES

The scope of work for direct E-Rate consulting services for July 1, 2015 through June 30, 2016 will include applications and support for the applications listed below, as deemed eligible under the Universal Service School and Libraries Eligible Services List (FCC CC Docket No. 96-45, Report and Order, 12 FCC Rcd 8776 (1997), and all amended revisions.

1. Funding Year 2016 Form 470 Planning

- b. CSM will schedule a kick-off meeting with stakeholders in the E-Rate process and establish deliverables. At a minimum, we suggest that representatives from the following district departments should attend: Business Services, Information Technology, Purchasing, Facilities, and Food Services. CSM highly recommends that this planning meeting be scheduled as soon as possible in order to allow adequate time for effective planning and execution of the E-Rate process.
- c. At a minimum, the following areas should be discussed at the kick-off and any necessary subsequent meetings:
 - i. Review of any current contracts/obligations for E-Rate funded services.
 - ii. Review and discuss the technology and communications needs of the district, for Funding Year 2016 as well as long term needs.
 - iii. Based on needs determined, define those that are eligible for E-Rate funding (Category One and Category Two services).
 - iv. Establish and agree upon a list of equipment/services that will be included on the E-Rate Form(s) 470.
 - v. Discuss any procurement regulations and requirements necessary to meet both E-Rate and local procurement guidelines.
 - vi. Calculate and review E-Rate discounts of school sites and district. Strategize on ways to optimize discounts.
 - vii. Calculate and review estimated Category Two per-site budgets and strategize on ways to maximize use of budgets.
 - viii. Review of budget and availability of district's funding sources to meet its share of E-Rate projects.
 - ix. Discuss document retention requirements and responsibilities.
 - x. Create a timeline of deliverables and assign responsibilities.
- d. These areas of discussion will encompass all possible projects, equipment, and services that have the potential for E-Rate funding, any new services that may be established during the planning meetings and any changes to the annual Eligible Services List:
 - i. **Category One Services:** Telecommunications (broadband), Telecommunications (voice), Internet Access, Long Distance, and Cellular (not an exhaustive list).
 - ii. **Category Two Services:** Network Hardware Updates (switches, routers, etc.), Cabling, Basic Maintenance, Managed Internal Broadband services and any other identified needs.

2. Form 470 Posting and Review of Request for Bid/Proposal

- a. CSM will prepare for district signature/certification and post E-Rate Form(s) 470 for requested equipment and services in conjunction to the release of any required Request for Bid/Proposal(s).
- b. Prior to the posting of the Form(s) 470, CSM will review all Request for Bid/Proposal language with the District's Purchasing/Procurement department to ensure compliance with E-Rate guidelines.

3. Review of Category One Services and Contracts

- a. CSM will review all current telecommunications and Internet service providers' bills and contracts. The review will include at a minimum the following components:
 - i. Recurring monthly charges
 - ii. Non-recurring charges
 - iii. Rates
 - iv. Service Level Agreements
 - v. Terms and conditions
 - vi. Time remaining on the contract(s)
 - vii. Basic termination charges
- b. Upon completion of the review CSM will make recommendations and assist in negotiating new contracts as needed.
- c. The District will need to include CSM in any communications and Request for Bid/Proposal processes involving carrier/provider services in which CSM may assist the District.

4. Form 471 Planning

CSM will coordinate all necessary steps in order to prepare the Form(s) 471 in order to meet E-Rate guidelines:

- a. **Form 471, Block 4: Calculation of E-Rate discounts.** CSM will work with the District's Food Services/Financial Services department to collect documentation regarding participation/eligibility in the National School Lunch Program. CSM will also verify the state school codes, the National Center for Education Statistics school codes, and urban/rural status per National Census designations for all school sites. Using this data, CSM will calculate the E-Rate discount for the District.
- b. **Form 471, Block 4: Calculation of E-Rate Category Two Budgets.** Using official enrollment data, CSM will calculate the E-Rate Category Two Budgets for all sites in the District.
- c. **Form 471, Block 4: FCC Survey.** CSM will facilitate the collection of annual survey data from the District as required by the FCC.
- d. **Form 471, Block 5: Funding Requests**
 - i. **Cost review of current Telecommunications (voice, broadband) and Internet Access services.** For existing services, CSM will review the costs for all billed telephone numbers (BTN's) in order to determine eligible costs for all eligible

sites on the Form 471 application. The District must provide access to billing account information during this process.

- ii. **Funding requests for new services.** CSM will prepare funding requests for all newly contracted Category One and Category Two services. This will include at a minimum: determining eligible recurring costs, determining eligible non-recurring costs, and preparing cost allocations for any ineligible costs.
- iii. **Form 471, Block 6: Budget documentation.** CSM will collect the necessary budget documentation from Business Services required to complete Block 6 of the Form(s) 471.
- iv. **Contract execution.** CSM will facilitate the execution of all contracts and/or agreements to ensure that they fall within the E-Rate Form 471 filing window.
- v. **Documentation for Item 21 Attachments.** CSM will collect documentation necessary for all E-Rate Item 21 Attachments. CSM will also upload and manage Item 21 data into the Form 471 for submission by deadline established by USAC.

5. Form(s) 471 Filing

CSM will prepare for district signature/certification and submit all necessary Form(s) 471 for E-Rate Funding Year 2015. CSM will determine the ultimate number of Form(s) 471 necessary in conjunction with the District as a result of E-Rate planning, process, number and types of funding requests and best practices.

- a. CSM will file Form(s) 471 for the following services (as applicable):
 - i. **Category One Services:** Telecommunications (data), Telecommunications (voice), Internet Access, Long Distance, Cellular and any other identified eligible service.
 - ii. **Category Two Services:** Network Hardware Updates (switches, routers, etc.), Cabling, Basic Maintenance, Managed Internal Broadband services and any other identified needs.

6. Program Integrity Review (PIA)

CSM will coordinate and respond to all requests for further information from USAC's PIA regarding Funding Year 2016 applications. This may include: providing documentation regarding calculation of E-Rate discounts, providing further documentation regarding funding requests beyond the Item 21 Attachments, and answering any questions regarding the funding requests.

7. Filing of Form(s) 486

Upon receipt of the Funding Commitment Decision Letter (FCDL) and start of services, CSM will file all necessary Form(s) 486 for Funding Year 2016 funding requests. Multiple Form(s) 486 may be necessary. CSM will coordinate the filing of the Form(s) 486 with the start of services (projects) to ensure that they are filed at the correct time.

8. Collection of E-Rate Funds

CSM will discuss with the District the various methods available to collect approved E-Rate funding. CSM will then work with the selected service providers to ensure that the district receives its approved E-Rate funds:

- a. **Discounts (Form 474):** Discounts on bills. CSM will complete and submit the documentation that service providers require in order for District to receive discounts.

- b. **Billed Entity Applicant Reimbursement (BEAR) Form 472:** CSM will prepare and submit BEAR forms for Category One eligible services. The district will receive E-Rate funds in the form of a reimbursement check subsequent to payment in full to the service provider. Processing of Form 472 for Category Two services is available at an additional hourly rate as outlined in Additional Professional Services.
- c. **Service Certifications:** CSM will assist the district and service providers to complete these forms as required for Priority One and Priority Two projects.

9. Form(s) 500 and Invoice Deadline Extension Request(s)

Should a project funded for Funding Year 2015 not be implemented during the implementation window, CSM at the District's direction will file Form(s) 500 to extend the implementation window, or to cancel the funding request. CSM will also file any Invoice Deadline Extension Requests found necessary so that the District receives its approved funding for implemented projects and services for Funding Year 2015 and any outstanding prior year issues *(if applicable)*.

10. Audits

Should the district be selected for an E-Rate audit, CSM will assist the district to prepare for and will be available (at the district's request) to be present at the audit. The FCC and/or USAC currently perform two types of E-Rate audits:

- a. **Payment Quality Assurance (PQA):** This is a remote process requiring additional documentation to substantiate whether a payment that was made is 'proper' or 'improper' in accordance with the Improper Payment Information Act (IPIA).
- b. **Beneficiary and Contributor Audit Program (BCAP):** This is more intensive audit of all of the applicant's (or contributor's) processes related to pre and post commitment activities. It may be conducted on-site or remotely.

11. Funding Year 2016 Invoice Reconciliation

As a direct result of our extensive experience with the audits, we have implemented a service offering that includes complete and detailed reconciliation of all invoices in accordance with USAC's "Documentation for Auditors Checklist". **The cost of this service is included in the total price of the contract.**

12. Final Summary of Standard Scope of Services

In working with our large client base CSM has found that the above Scope of Services covers the majority of work involved in successful E-Rate applications, receipt and recovery of E-Rate funds. CSM has the flexibility to slightly modify the Scope of Work per an individual district's needs. Should the District identify further services required, we are confident that CSM will be able to accommodate the request.

ADDITIONAL PROFESSIONAL SERVICES

CSM can provide the following services in addition to our basic scope of work; hours will be billed at standard rates specified in the contract between CSM and the District.

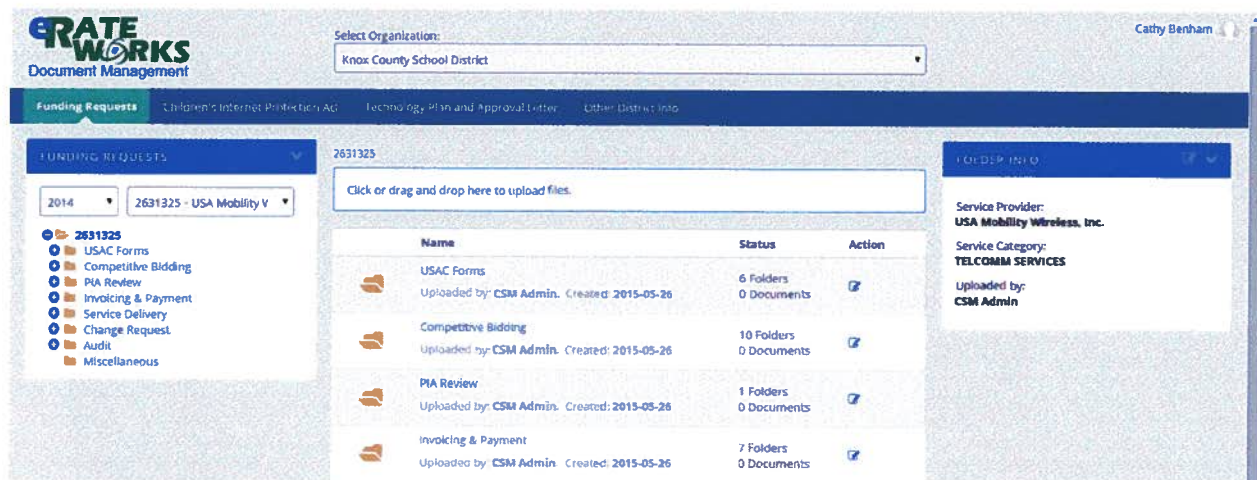
- a. **Selective Reviews, Special Compliance Reviews, BCAP Audits, and Appeals**
At the District's request, CSM will prepare and respond to heightened scrutiny reviews, audits, and/or file associated appeals or requests for waiver with the FCC and USAC.
- b. **Training, Speaking Engagements, Special Meetings and Advocacy**
CSM consultants are available conduct onsite training of District staff, to speak at special events such as Board Meetings, and are available to represent the District at meetings with E-rate stakeholder groups, with USAC and at the FCC.
- c. **Recovery**
Assess and process for District issues with prior E-Rate applications not previously contracted by with Consultant. Consultant to be paid 10% of recovered funding or an amount not to exceed the current annual contract value per prior funding year involved.
- d. **Surveys**
If the District elects to utilize a survey process for documenting low income student counts, CSM can provide guidance to District staff in determination, distribution, collection and evaluation of household surveys.
- e. **RFPs and Procurement Assistance**
CSM can prepare RFPs and provide additional assistance in administration of the competitive bidding process, including supporting job walks, bid openings, and evaluation of proposals.
- f. **Technical Assessment and Preparation of Specifications**
CSM's technology professionals can assess District's technology needs and prepare specifications appropriate for inclusion in bid solicitations at the District's request.
- g. **Technology Plan and Technology Plan Addenda preparation**
CSM's technology professionals can prepare Educational Technology Plans in accordance to guidelines established by the State Departments of Education and best practices for K-12 organizations.

Hourly Rates: At the written request of the District, the Consultant will provide these Additional Professional Services based upon the following hourly rates.

Officer/Principal	\$175 per hour
Information Technology Consultant/Director	\$150 per hour
Lead Consultant	\$120 per hour
Specialist	\$80 per hour

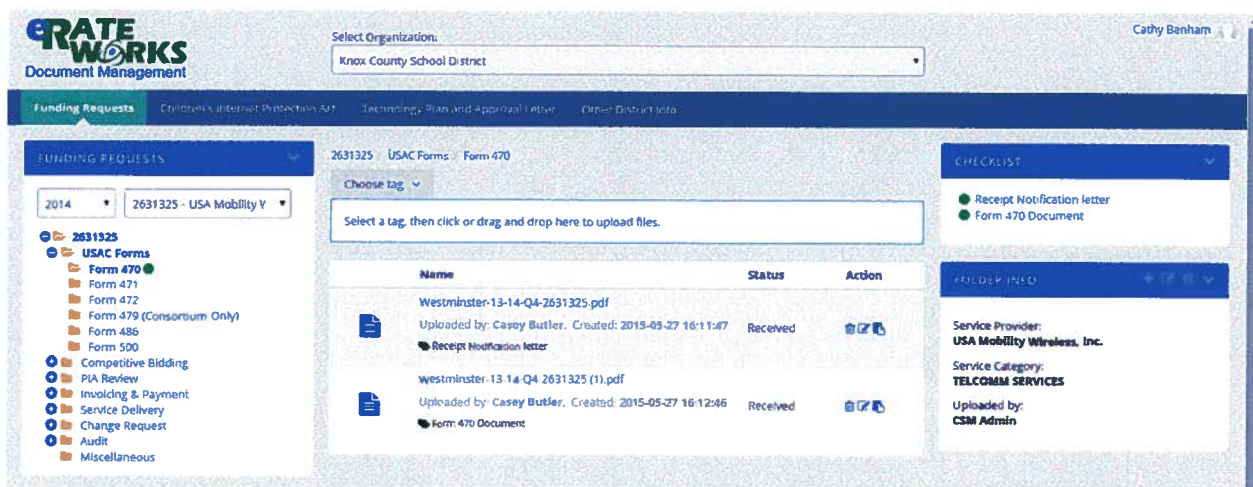
DOC-U-MANAGE™

In response to increased audit activities and the FCC's extended requirement to retain E-rate documentation for a minimum of 10 years, CSM has developed an E-rate document management system for retention of documents in the cloud for future instant access. The system follows retention guidelines established by USAC and gives our customers peace of mind when retaining documents for future audit-readiness. The license is districtwide unlimited users and is based upon a per student fee.



Features

- ✓ Simple drag and drop of documents from your desktop
- ✓ Pre-populated funding request labels and file structure personalized to your District
- ✓ Prompts for uploading documents by funding requests
- ✓ Checklists with color coding features to show progress



PRICING

Standard Scope of Services

The cost for services rendered to **Blackhawk School District** regarding the E-Rate application process for the period of July 1, 2015 through June 30, 2016, as referred to in the Standard Scope of Services, will be invoiced and due to the Consultant as follows:

Base contract amount ("Base Amount") of **\$4,000** plus;

An amount equal to six percent (6%) of Category Two applications submitted during the Term of this Agreement, **not to exceed a total amount of \$10,000** ("C2 Amounts").

Invoices for the Base Amount will be provided monthly beginning at final execution and continue through June 30, 2016.

Invoice(s) for C2 Amounts will be provided upon completion of the annual E-Rate Form 471 submission process applicable to Category Two submissions during the Term of this Agreement.

The amounts in this section do not include any costs related to additional Professional Services offered by Consultant that may be requested by the District.

Additional Professional Services

Cost for additional professional services desired will be determined by the amount of hours (estimated and agreed upon by District personnel and CSM) required to complete the requested additional professional service(s). Please refer to ***Hourly Rates***, below

Officer/Principal	\$175 per hour
Information Technology Consultant/Director	\$150 per hour
Lead Consultant	\$120 per hour
Specialist	\$80 per hour

CSM can prepare an estimate for such activities for budget purposes at District's direction.

Doc-U-Manage™

Consultant will provide online document management software allowing for multi-user access to maintain documents in an organized manner to meet the USAC 10 year requirement and provide an efficient document management system for the District. The annual license fee for the software is **\$0.55 per student**.

Thank you for this opportunity to provide a proposal to Blackhawk School District. Should you have any questions, please don't hesitate to contact Kim Friends for additional information or to request contracting documents.

SAMPLE AGREEMENT

TERMS AND CONDITIONS

The following terms and conditions are taken from the contract which would be offered to the District upon the award of E-Rate Services to CSM. This is for reference only.

RECITALS

- A. District desires to have a Consultant to prepare documentation, forms and applications regarding the Federal Communications Commission ("FCC") E-Rate program.
- B. District has the authority to enter into an Agreement with a Consultant for purposes of complying with the FCC E-Rate program.
- C. Consultant is duly qualified to provide the services called for in this Agreement in consideration for the fee stipulated in this Agreement.

I. CONSULTANT'S RESPONSIBILITIES – SCOPE OF SERVICE

- 1. Shall provide to District completed forms and processes related to all Category One and Category Two applications of the Federal Communications Commission E-Rate filings with the schools and library division ("SLD") during the term of this Agreement as shown in Section IV., 1. Services provided under this agreement to include the following:
 - Advise and coordinate the preparation and filing of FCC Forms: 470, 471, 486 and 500.
 - Advise and coordinate the preparation and filing of:
 - Item 21 Attachments
 - Form 472 (Billed Entity Applicant Reimbursement Form BEAR) and/or vendor specific discount forms (i.e. Data Gathering Form, Existing Services List, etc.) for Category One services only
 - Implementation Deadline Extension Request (ImDER)
 - Invoice Deadline Extension Request (IDER)
 - Service Provider Identification Number (SPIN)Change Requests
 - Service Substitution Requests
 - Service Certifications (standard):
 - Program Integrity Assurance (PIA)
 - Payment Quality Assurance (PQA) requests
 - Invoice reconciliation for previous funding year disbursements
- 2. Act as District's main point of contact with the SLD.
- 3. Advise District on E-Rate compliance including updates on rule or regulatory changes, as applicable.

II. DISTRICT RESPONSIBILITIES

1. Provide all required information and data for filing all forms with the SLD in a timely manner.
2. Take such official action, such as review of Consultants drafts and promptly sign and return all forms required for filing with a third party in a timely manner so that Consultant can perform its obligations under this Agreement.
3. Promptly pay Consultant its fee for services rendered. All payments are due and payable within 30 days after delivery to the District of the invoice.
4. Sign, date and certify all forms filed by Consultant on District's behalf.

III. MISCELLANEOUS

1. **Term.** July 1, 2015 (or date of execution as shown below, whichever is later) through June 30, 2016.
2. **Modifications.** This Agreement may be modified only by a written amendment to this Agreement, executed by both parties.
3. **Independent Contractor.** While engaged in carrying out and complying with the terms and conditions of the Agreement, Consultant is an independent contractor and not an officer, employee, or agent of the District.
4. **Additional Professional Services not included in SECTION I CONSULTANT RESPONSIBILITIES – SCOPE OF SERVICE.**
 - A. Services and costs in this section are not included in Section I (Consultant Responsibilities – Scope of Service) and Section III (Cost). At the written request of the District, the Consultant may provide the additional Professional Services listed below, based upon the following hourly rates.

Officer/Principal	\$175 per hour
Information Technology Consultant/Director	\$150 per hour
Lead Consultant	\$120 per hour
Specialist	\$80 per hour

An authorized agent of the District may request the services below via written request to the Consultant. The Consultant will provide the District with an estimate of the number of hours and rates to complete the requested task. Consultant will provide a quote in the form of an email, hard copy quote, electronic copy quote or other means, as appropriate and acceptable to the District and Consultant. These Professional Services may include but are not limited to the following:

- Assist in the preparation of RFPs/RFIs/RFQs, etc., including technical specs
- Surveys (alternate discount method)
- Comprehensive Technology Plan Writing
- Coordination of response to Special Compliance Reviews
- Selective Review Information Request (SRIR)
- Form 472 (Billed Entity Applicant Reimbursement Form BEAR) and/or vendor specific discount forms (i.e. Data Gathering Form, Existing Services List, etc.) for Category Two services
- Preparation of USAC and/or FCC appeals

- Technology Plan and Technology Plan Addenda preparation, technology needs assessment, etc.
- Audit support, including Beneficiary Contributor Audit Program
- Preparation of documentation/reports/presentations for Board meetings or other special meetings
- Assess and process issues with prior E-Rate applications not previously contracted by with Consultant (invoiced at ten percent 10% of amount recovered)
- Travel expenses for any on-site meetings including hourly rate, standard mileage reimbursement and actual accommodation/travel expense (including airfare if applicable)
- Other E-Rate related services



5. **E-Rate Doc-U-Manage Software.** Consultant will provide online document management software allowing for multi-user access to maintain documents in an organized manner to meet the USAC 10 year requirement and provide an efficient document management system for the District. The annual license fee for the software is \$0.55 per student from the 1st Period Principal Apportionment CALPADS enrollment..

Please check the appropriate box for designation of service ☐ Yes ☐ No

6. **Conflict of Interest.** No business or personal relationship exists between any school employee and the service provider.
7. **Attorney's Fees and Costs.** In any litigation, arbitration or other proceeding by which one party either seeks to enforce its rights under this Agreement (whether in contract, tort, or both) or seeks a declaration of any rights or obligations under this Agreement, each party shall bear its own attorney fees, together with any costs and expenses to resolve the dispute and to enforce the final judgment.
8. **Severability.** If any term of this Agreement is held by a court of competent jurisdiction to be void or unenforceable, the remainder of this Agreement shall remain in full force and effect and shall not be affected.
9. **Notices.** All notices that are required to be given by one party to the other under this Agreement shall be in writing and shall be deemed to have been given if delivered personally or enclosed in a properly addressed envelope postage prepaid and deposited with a United States Post Office for delivery by first class and certified mail addressed to the parties at the following addresses, unless such addresses are changed by notice, in writing, to the other party.

Sample School District
1234 ABC Street
Anytown, XX, 123456

CSM Consulting, Inc.
P.O. Box 4408
El Dorado Hills, CA 95762-0018

10. **Limitation of Liability.** The aggregate liability in connection with any claim arising out of or relating to this agreement whether in contract, tort or otherwise, shall be limited to an amount equivalent to the fee(s) paid by the District to Consultant for services performed pursuant to this Agreement. Consultant shall not in any circumstances be liable to District, whether in contract, tort or otherwise, for any special, indirect, incidental, or consequential damages of any kind whatsoever whether Consultant is made aware in any way due to, resulting from, or arising in connection with the services performed by Consultant pursuant to this Agreement. District's right to monetary damages listed above in that amount shall be in lieu of all other remedies that District may have.
11. **Governing Law.** The validity of this Agreement and each of its terms and provisions, as well as the rights and duties of the parties under this Agreement, shall be construed pursuant to and in accordance with the law of the State of California.
12. **Authority.** The individuals executing this Agreement represent and warrant that they have the legal capacity and authority to execute and contractually bind their respective legal entities.
13. **Entire Agreement.** This Agreement supersedes any and all other agreements, whether oral or in writing, between the parties with respect to the subject of this Agreement. This Agreement contains all of the covenants and agreements between the parties with respect to the subject of this Agreement, and each party acknowledges that no representations, inducements, promises, or agreements have been made by or on behalf of any party except the covenants and agreements embodied in this Agreement. No agreement, statement, or promise not contained in this Agreement shall be valid or binding on the parties with respect to the subject of this

AMENDMENT TO CONTRACT FOR EMPLOYMENT
SUPERINTENDENT

THIS AGREEMENT is made this ____ day of _____, 2015, by and between the BOARD OF SCHOOL DIRECTORS OF THE BLACKHAWK SCHOOL DISTRICT, with its Administrative Offices located at 500 Blackhawk Road, Beaver Falls, PA 15010 (hereafter referred to as "District" or "BSD")

A

N

D

Dr. Melanie Kerber, an adult individual (hereafter referred to as "Dr. Kerber" or "Superintendent") residing in the Commonwealth of Pennsylvania.

WHEREAS, the Board of School Directors of the Blackhawk School District appointed Dr. Kerber as Superintendent for a term beginning July 1, 2014 through June 30, 2017 pursuant to Sections 1071 and 1073 of the Pennsylvania School Code (as amended, 24 P.S. §§ 10-1071, 10-1073); and

WHEREAS, the School District and Superintendent entered into a written Contract for Employment dated June 30, 2014 memorializing the terms and conditions of the Superintendent's appointment; and

WHEREAS, the School District and Superintendent wish to amend the Contract for Employment dated June 30, 2014 with respect to annual salary and the provision of a healthcare stipend; and

WHEREAS, Board action to amend the Contract for Employment dated

June 30, 2014 was approved at a meeting of the Board of School Directors on November 19, 2015; and

NOW, THEREFORE, with the intent to be legally bound hereby, the parties hereto agree as follows:

1. The Board, by action of November 10, 2015 hereby agrees to a 3% raise of \$3,600 retroactive to July 1, 2015 and amends the Contract for Employment dated June 30, 2014 appointing Dr. Melanie Kerber to the position of Superintendent for a term beginning July 1, 2014 through June 30, 2017 as follows:

3. Compensation. (a) In consideration of the Superintendent's services, the BSD shall pay to her an annual salary of One Hundred Twenty Thousand Dollars (\$120,000), in twenty-four (24) equal semi-monthly installments of Five Thousand Dollars (\$5,000.00) each. Beginning July 1, 2015, the Superintendent's annual salary will be increased three percent (3%) to One Hundred Twenty Three Thousand Six Hundred Dollars (\$123,600), in twenty-four (24) equal semi-monthly installments of Five Thousand One Hundred Fifty Dollars (\$5,150.00).

If Dr. Kerber receives a satisfactory rating for the performance evaluation required in Paragraph 15 for the 2015-2016 academic year, then beginning July 1, 2016, the Superintendent's annual salary will be increased three percent (3%) to One Hundred Twenty Seven Thousand Three Hundred Eight Dollars (\$127,308), in twenty-four (24) equal semi-monthly installments of Five Thousand One Hundred Fifty Dollars and Fifty Cents (\$5,304.50).

11. Healthcare Insurance. Dr. Kerber has elected to take the District's healthcare insurance for the 2015-2016 academic year. In exchange for declining the District's healthcare insurance during the 2014-2015 and 2016-2017 school years, Dr. Kerber will receive a Three Thousand Dollar (\$3,000) per year healthcare stipend for the 2014-2015 and 2016-2017 school years.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals the date first above.

ATTEST:

SCHOOL DISTRICT

Secretary

By: _____
Dr. Lance Rose
Board President

WITNESS:

DR. MELANIE KERBER

Superintendent