

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.

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SAN LEANDRO UNIFIED SCHOOL DISTRICT

Proposal for E-Rate Consulting Services for Y18 (2015-2016)

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

- No Missed Opportunities.
- No Missed Deadlines.

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E-mpa MEMBER

CSM



E-Rate Services Proposal

TABLE OF CONTENTS

SECTION NAME		PAGE NUMBERS
1.	Executive Summary	1 - 2
2.	Company Profile	3
3.	Résumés of Key Personnel	4 - 5
4.	Statement of Qualifications	6
5.	Insurance	7
6.	References	8
7.	E-Rate Works	9 - 12
8.	Scope of Services	13 - 18
9.	E-Rate Services Pricing Proposal	19
10.	Terms and Conditions	20 - 23

EXECUTIVE SUMMARY

It is our pleasure to present this proposal to San Leandro Unified 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 is a Board member of the E-Rate Management Professionals Association (E-MPA™) and our firm abides by its strict Code of Ethics. Additionally, we have 5 staff members who have been named "Certified E-Rate Management Professionals". At this time, there are less than 25 "Certified" consultants in the Nation.

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 and have a combined 67 years of experience. 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 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 in fact was cited 4 times in the recently published 6th Report and Order that codified several rule changes.[1] 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.

[1] The 6th 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

CSM has been involved in numerous audits conducted not only by FCC-retained auditors (KPMG, 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 to develop and present annual training seminars, offer guidance, and resolve issues on a federal level.

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.

On a personal note, we consider the opportunity to represent San Leandro Unified School District's E-Rate application processes and vision an honor and a privilege. We take our responsibilities seriously and you will experience the difference when working with CSM.

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@csmcentral.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

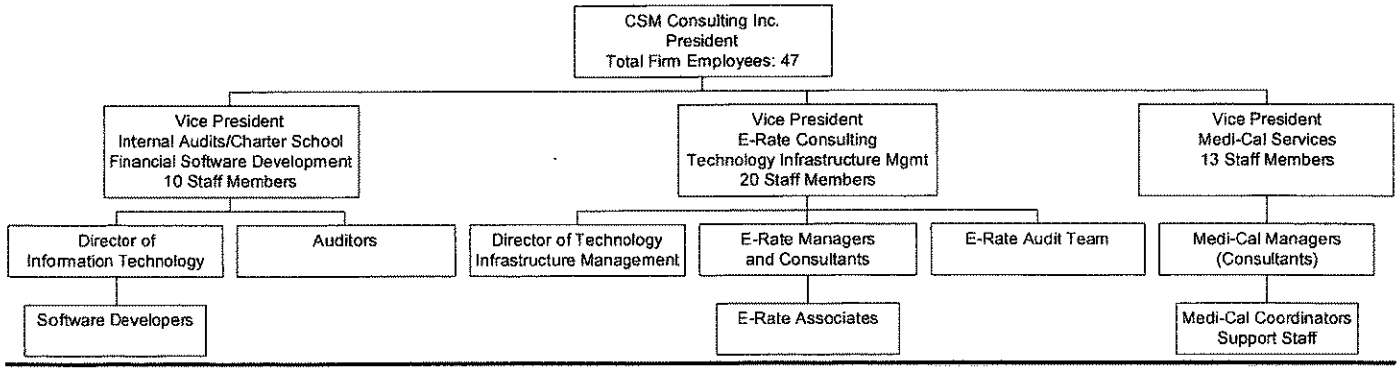
Tracy, California
324 East 11 Street, Suite E-3
Tracy, CA 95376
209.834.0556 Phone
209.834.0087 FAX

Sacramento, California
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Satellite Offices:
Redding, California
Laguna, California
Hendersonville, Tennessee
Marietta, Georgia
Columbia, Missouri

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

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. Additionally, Ms. Friends has become a trusted colleague on a national front with USAC and associated agencies. She intimately understands the E-Rate process and program and is considered one of the very few *premier experts* in her field.

Michelle Harken - *Director, Pre-Commitment Operations*

Michelle Harken is a Certified E-Rate Management Professional, E-MPA, Inc. and has 10 years of experience providing consulting services on all aspects of the E-Rate program to school districts and county offices of education throughout California. She currently oversees the E-Rate department in both the Tracy and Sacramento offices, working with a large client base. Michelle is a statewide trainer for California Department of Education for school districts. She is one of the select few Certified E-rate Management Professionals in the country, certified by the E-rate Management Professionals Association. Additionally, Mrs. Harken has extensive experience acquired over the last 15 years with external and internal auditing of school districts with a focus on Federal and State programs and internal control and compliancy issues.

Beverly Agron – Consultant, Pre-Commitment Operations

Bev joins CSM after many years working at AT&T in a variety of sales and sales support positions. Her last assignment there was to serve as AT&T's West Coast E-rate Specialist from 2005-2013. Her work included providing guidance and support for all AT&T sales personnel on E-rate program rules, assisted AT&T sales to respond to E-rate sales opportunities, audited for AT&T E-rate program compliance, trained customers and AT&T sales representatives about the program, escalated AT&T E-rate related issues to AT&T Legal and senior management, communicated to sales about key E-rate related subjects and deadlines, and assisted customers when appeals needed to be filed, etc.

In addition to her E-rate position, Bev was the AT&T liaison and specialist for the California Teleconnect Fund (CTF) program. In this role, Bev communicated to customers and AT&T employees about program changes, maintained and updated all AT&T CTF application-related documentation, provided feedback on impacts of proposed program changes to AT&T senior management and escalated all AT&T CTF-related issues for resolution.

Scott Harken – Director, Post-Commitment Operations

Scott has ten years of experience with all phases of the E-Rate Program and thirteen 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 its E-Rate applications, past and present. He is integral in support of the ongoing application processes including PIA review and documentation retention.

Drulynne Vang – Manager, Quality Control

Drulynne has been a member of the CSM team for six years. Her overall knowledge of the program and attention to detail has been invaluable to our group and the clients that she works with. Drulynne 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.

Gary L. Hiller - President, ITS (RFPs, Design, Project Management)

Mr. Hiller has over 33 years of broad professional Telecommunications Industry experience that he brings to each of his clients' projects. Since founding ITS in 1996, Gary has been focused on K-12 education, developing industry leading plans and specifications for clients throughout Southern California. Most recently was a five-site, $6 million dollar E-Rate Project designed and managed by ITS that came in under budget and on schedule. Gary also recently served as a Program Manager on an IT project valued in excess of $635 million dollars. He has been associated with and a member of the Building Industry Consulting Services International (BICSI) since 1982, and held the RCDD, NTS and OSP professional designations for over 25 years. While a contributing writer and author to several Industry and Federal Design Guides and Standards, Gary has also been recognized by both the Department of Army as well as the United States Marine Corps for his engineering and project management contributions on several Department of Defense projects. Gary was awarded the rare and prestigious Superior Civilian Service Medal. Gary and his firm's core belief and practices are built around being advocates for their clients, and protecting the clients' interests and investments on all projects.

STATEMENT OF QUALIFICATIONS

The following statements reflect the reasons that we believe CSM to be most highly qualified to support San Leandro Unified School District ("SLUSD").

1. Experience – 300+ E-rate clients nationwide.
2. Depth - The principles assigned to SLUSD have a combined experience in school districts of over 30 years.
3. We have been providing successful, comprehensive E-Rate Consulting Services for 8+ years.
4. Commitment to our clients is second to none.
5. Independent – CSM is an independent consultancy without relationships to any contractors or service providers.
6. Technology expertise in addition to E-rate application expertise.
7. Technology tools – CSM uses the latest in proprietary software to assist in the E-rate application process for our clients.
8. Unique relationship with USAC.

In the past nine years, CSM has grown from a client base of 13 to more than 300 clients.

FY 2010
- $149,574,140.37 committed
- 380 Form 471 applications filed
- 1,950 Funding Requests

FY 2011
- $482,422,306.81 in applications
- 471 Form 471 applications filed
- 2,751 Funding Requests

FY2012
- $652,716,333.20 in applications
- 772 Form 471 applications filed
- 3,004 Funding Requests

FY2013
- $561,508,356.62 in applications
- 843 Form 471 applications filed
- 3,537 Funding Requests

FY2014 - ***Does not include totals for applications not yet certified with USAC; final numbers will be higher***
- $636,012,281.58 in applications
- 548 Form 471 applications 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, 4 of the 20 largest school districts in the Country and every size, shape and complexity in between.

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 SLUSD with SLUSD named as additional insured.

REFERENCES

As E-Rate clients run simultaneously, the list below is of some of our current client references as of 2015-2016 E-Rate filing.

Ann Dunkin, Chief Technology Officer **Palo Alto Unified School District** 25 Churchill Ave, Palo Alto, CA 94306 650-329-3776 adunkin@pausd.org	Erik Heinrich, Director of Infrastructure **San Francisco Unified School District** 555 Franklin Street, San Francisco, CA 94102 415-615-8978 heinriche@sfusd.edu
Robert Torres, Chief Technology Officer **Stockton Unified School District** 701 N. Madison Street, Stockton, CA 95202 209-933-7090 rtorres@stockton.k12.ca.us	Joe Zeligs, Director of Information Technology **Santa Clara Unified School District** 1889 Lawrence Road, Santa Clara, CA 95051 (408) 423-2092 jzeligs@scusd.net
Ed Smith, Project Management **CENIC** 16700 Valley View, Suite 400, La Mirada, CA 90638 714-220-3453 esmith@cenic.org	Jonathan Allen, Executive Director of Technology **Alameda County Office of Education** 313 W. Winton Avenue, Hayward, CA 94544 (510) 670-4290 jallen@acoe.org

E-Rate Works

CSM believes that having the right tools and accurate information empowers all involved to be successful in navigating the often murky waters of the E-Rate program.

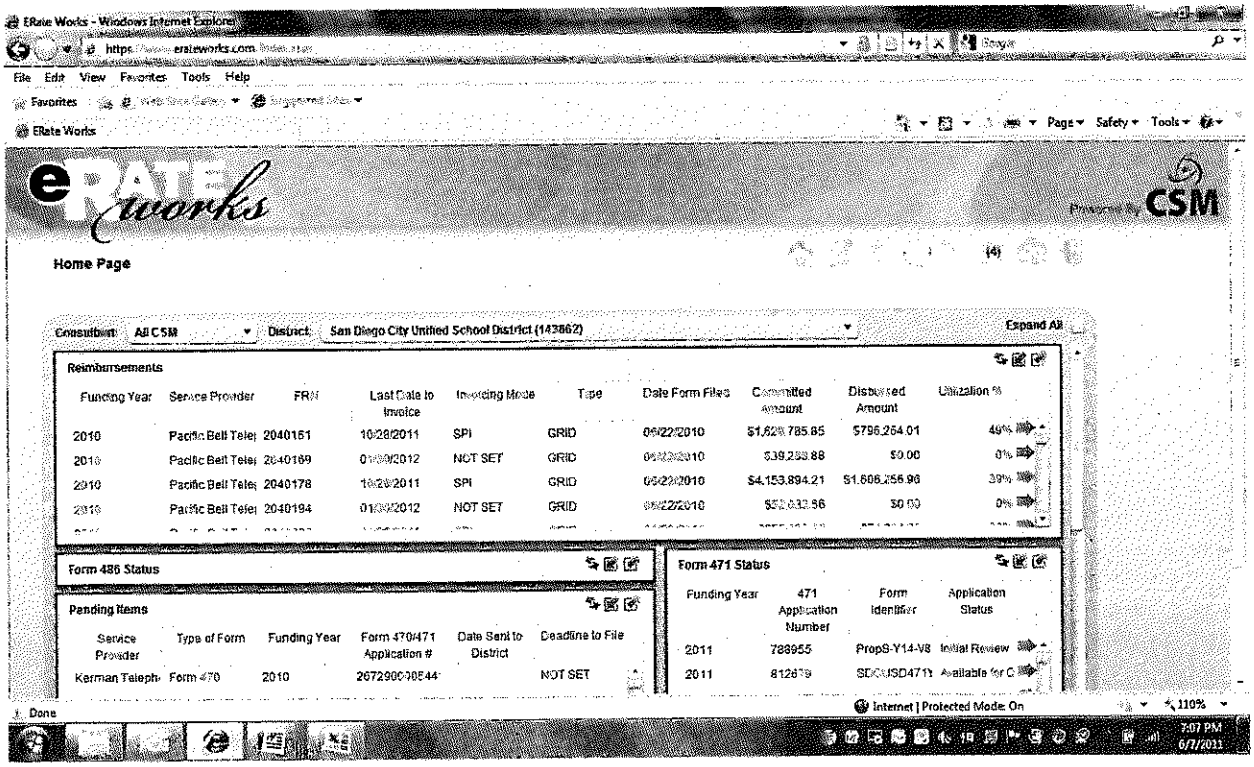
CSM has been working with E-Rate for many years and encountered the myriad ways that it can be a challenging experience for an applicant. It is our primary goal to make this process as simple and transparent to the client as possible, while at the same time ensuring that there is a clear understanding of the program rules and guidelines to which an applicant must adhere.

We also believe it is important for all parties to be educated on the E-Rate process, and what they can regard as likely to occur as we move forward. We have presented many times to Boards of Educations, ensuring that the Board understands the E-Rate timelines, and what they can or cannot expect from the program.

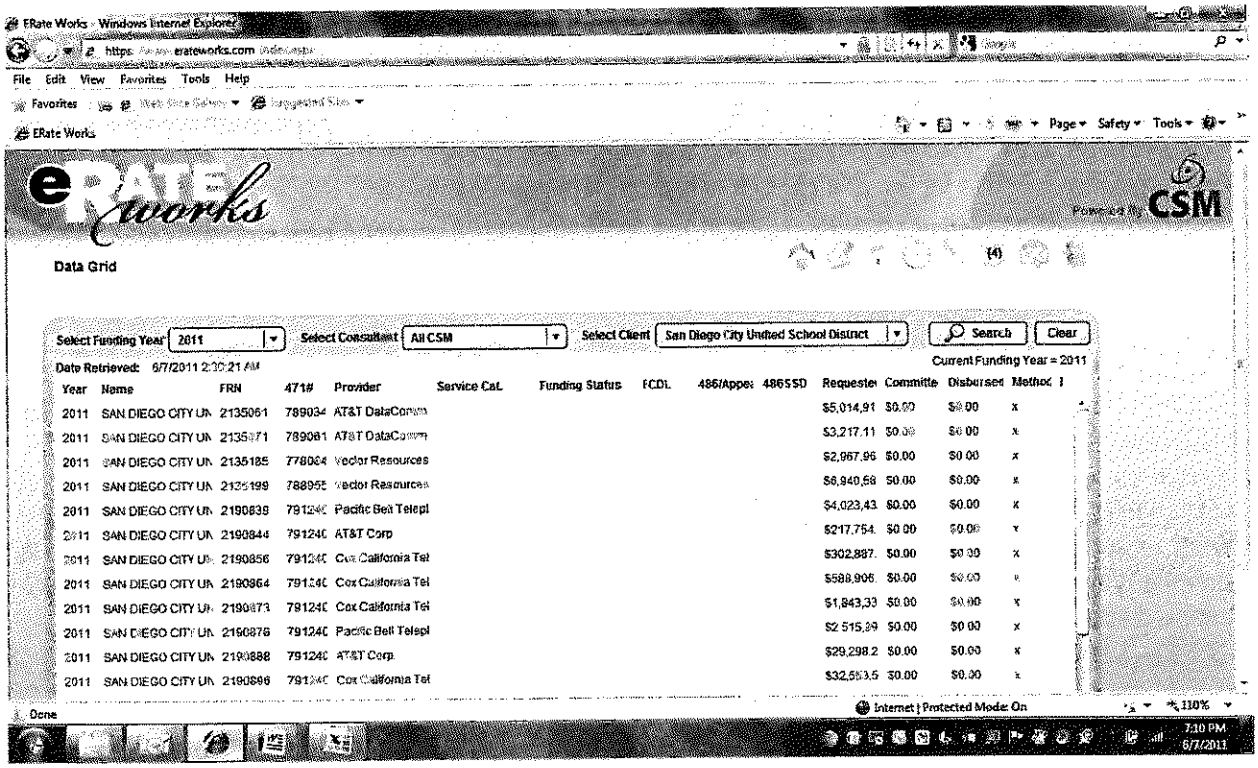
CSM utilizes a propriety program called E-Rate Works to monitor and track each aspect of the E-Rate program as it pertains to applicant forms and filings. We can, at a glance, determine where an applicant is in the filing, review, or reimbursement phase of a given year. Screen shots are included below and an online demonstration is available upon request.

CSM's Internal Tracking Tool

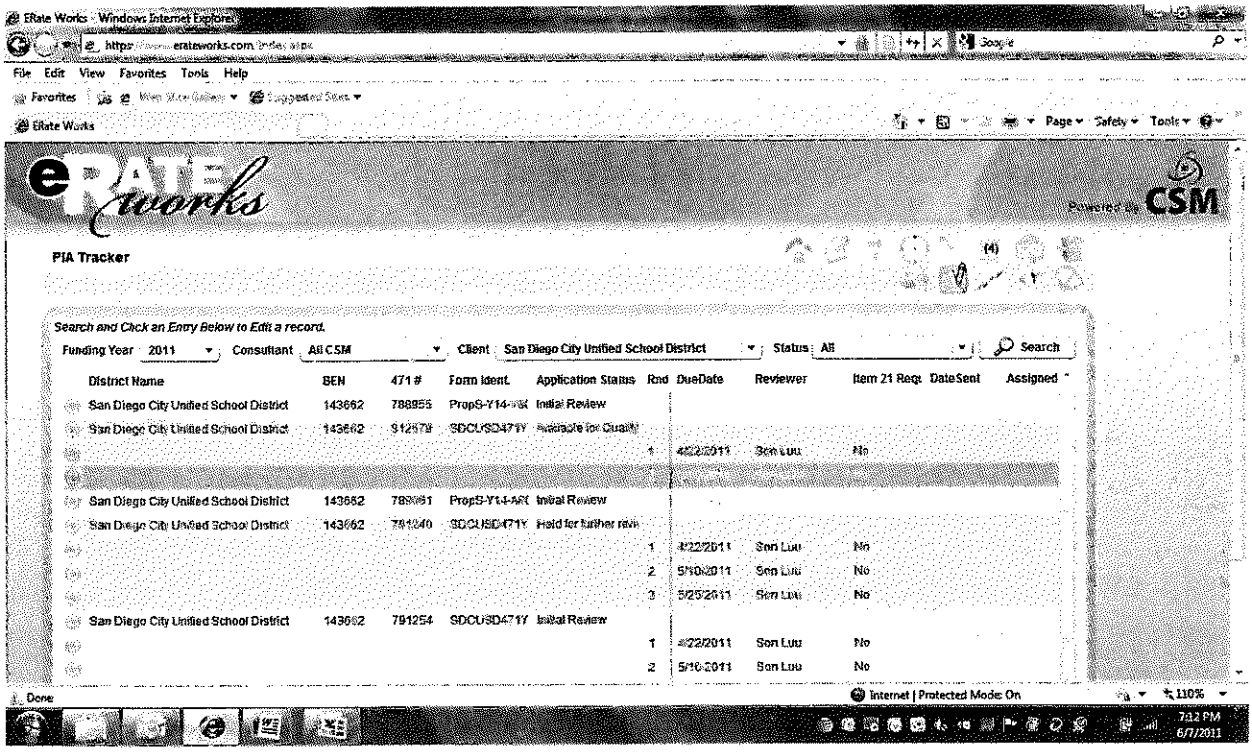
Main Data Grid: Pulls together the most recent information for a particular client on one page. More detailed views are available in other modules of the program.



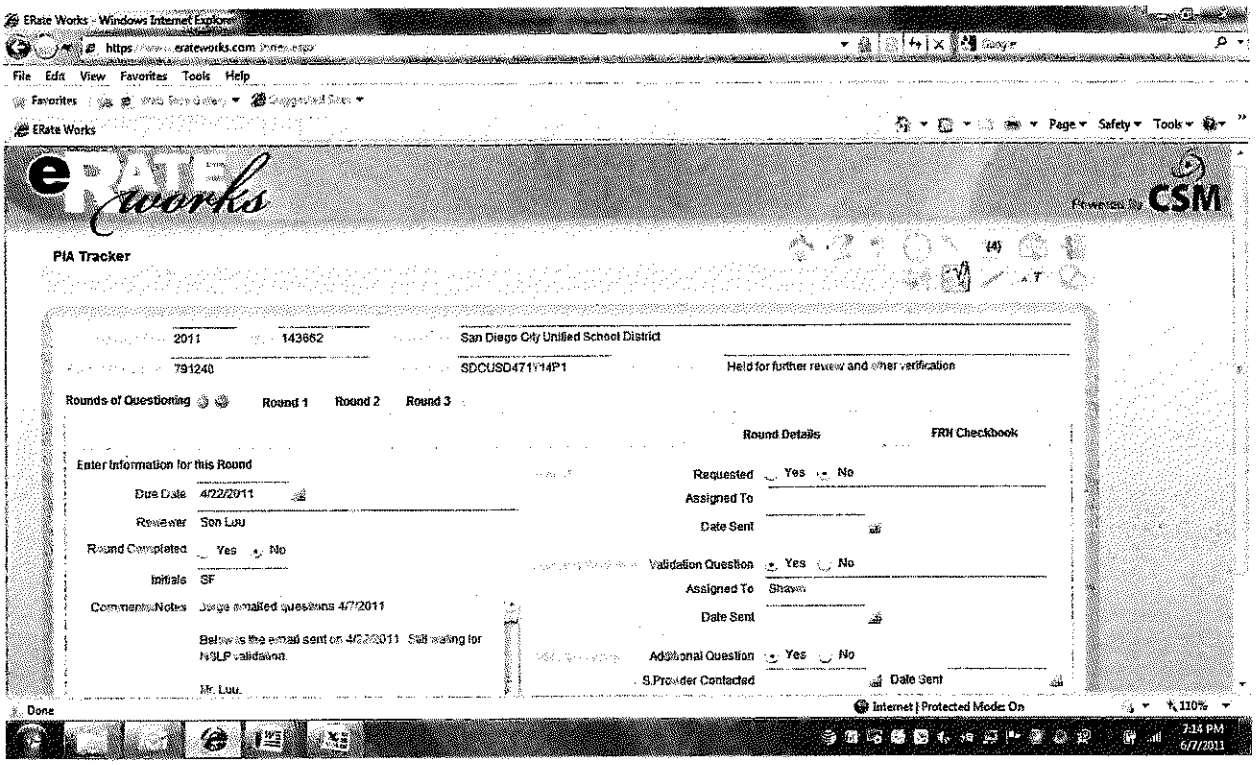
At a glance: Single funding year with detail view for an individual client.



PIA Tracker: Comprehensive tracking and management tool for PIA review and outreach. This allows CSM to track very carefully, the contact we have with various reviewers throughout the process of application approval.



The PIA Tracker also expands to track details of all communications between CSM and PIA application reviewer



E-Rate Works is a tool that is utilized on a daily, hourly basis. It pulls down the most recent data from USAC and CDE websites to provide us with a comprehensive, up-to-date report of where each of our clients are in the E-Rate process and timeline.

SCOPE OF SERVICES

The following is an outline of CSM's standard E-Rate consulting services.

1. **Funding Year 2015 Form 470 Planning**
    a. Kick-off meeting to be conducted on site with stakeholders

2. **Master Technology Plan Review**

3. **Form 470 Posting and Issuing of Request for Bid/Proposal**

4. **Review of Telecommunications Carrier Services and Contracts**

5. **Form 471 Planning**
    a. **Form 471, Block 4: Calculation of E-Rate discounts.**
    b. **Form 471, Block 5: Funding Requests**
        i. **Cost review of current Telecommunications Services (voice).**
        ii. **Funding requests for new services.**
        iii. **Form 471, Block 6: Budget documentation.**
        iv. **Contract execution.**
        v. **Documentation for Item 21 Attachments.**

6. **Form(s) 471 Filing**
    a. File Form(s) 471:
        i. **Priority One Services**
        ii. **Priority Two Services (Internal Connections/Basic Maintenance of Internal Connections)**
    b. Item 21 Attachments.

7. **Program Integrity Review (PIA)**

8. **Item 25 Selective Review** *(if required)*

9. **Filing of Form(s) 486 Upon receipt of the Funding Commitment Decision Letter (FCDL)**

10. **Collection of E-Rate Funds**
    a. **Discounts on Service Provider Bills.**
    b. **Billed Entity Applicant Reimbursement (BEAR) Form 472**
    c. **Service Certifications:**

11. **Form(s) 500 and Invoice Deadline Extension Request(s)**

12. **Funding Year 2015 Audits**
    a. **Payment Quality Assurance (PQA)**
    b. **Beneficiary and Contributor Audit Program (BCAP)**
    c. **Other compliance audits/reviews as defined by USAC and/or FCC**

DETAILED SCOPE OF SERVICES

San Leandro Unified School District

E-Rate Services – Funding Year 2015

The scope of work for direct E-Rate consulting services for Funding Year 2015 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 2015 Form 470 Planning**

   b. CSM will schedule an onsite 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 2015 as well as long term needs.
      iii. Based on needs determined, define those that are eligible for E-Rate funding (Priority One and Priority 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. Review of 2-in-5 rule and its impact on applications for Priority Two services *(not applicable at this time).*
      vii. Calculate and review E-Rate discounts of school sites and district. Strategize on ways to optimize discounts.
      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. **Priority One Services:** Telecommunications (data), Telecommunications (voice), Internet Access, Long Distance, and Cellular (not an exhaustive list).
      ii. **Priority Two Services**: Network Hardware Update (switches, routers, etc.), Cabling, Basic Maintenance Hardware/Network and any other identified needs.

2. **Master Technology Plan Review**
    a. CSM will review the district's Master Technology Plan or draft of a new plan prior to the posting of E-Rate Form(s) 470.

    b. CSM will review the current plan and determine if it needs to be amended in order to include any planned changes that may be funded by E-Rate *(Priority Two only per FCC 6th Report and Order)*. If the District wishes assistance in the writing of this addendum, please select **Item III, C** in **Term and Conditions**.

3. **Form 470 Posting and Issuing 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.

4. **Review of Telecommunications Carrier Services and Contracts**
    a. CSM will review all current and future 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.

5. **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 calculate the E-Rate discount for all school sites and the district.

    b. **Form 471, Block 5: Funding Requests**

i. **Cost review of current Telecommunications Services (voice).** For existing tariff services, CSM will review the costs for all billed telephone numbers (BTN's) in order to claim all 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 Priority One and Priority 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.

6. **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. **Priority One Services:** Telecommunications (data), Telecommunications (voice), Internet Access, Long Distance, Cellular and any other identified eligible service.
   ii. **Priority Two Services**: Network Hardware Update (switches, routers, etc.), Cabling, Basic Maintenance Hardware/Network and any other identified needs.

b. CSM will also prepare and submit all supporting Item 21 Attachments in accordance with new FCC guidelines.

7. **Program Integrity Review (PIA)**

CSM will coordinate and respond to all requests for further information from USAC's PIA regarding Funding Year 2015 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.

8. **Item 25 Selective Review**

Should the district be selected for an Item 25 Selective Review, CSM will work with the district to collect any additional detailed documentation as required, including detailed budget information, and will prepare the Item 25 response.

9. **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 2015 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.

10. 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 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.

c. **Service Certifications:** CSM will assist the district and service providers to complete these forms as required for Priority One and Priority Two projects.

11. 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)*.

12. Funding Year 2015 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.

13. Funding Year 2015 Documentation and Audit Preparation

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[2].***

[2] NO other firm in the Nation performs this service on behalf of its clients. This is another way that CSM demonstrates immense value added benefit to our valued clients

14. **Additional Professional Services**

a. **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.

b. **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. CSM can provide this guidance in addition to our basic scope of work and hours will be billed at standard rates specified in the contract between CSM and the District.

c. **RFPs**
If the District wishes to have a formal RFP written, CSM will provide this service in addition to our basic scope of work and hours, to be billed at standard rates specified in the contract between CSM and the District.

d. **Technical Specifications**
If the District wishes to have technical specifications developed and written, CSM will provide this service in addition to our basic scope of work and hours, to be billed at standard rates specified in the contract between CSM and the District.

e. **Comprehensive Technology Plan Writing**
If the District wishes to have CSM write or assist in writing a comprehensive E-Rate or Educational Technology Plan, this service can be provided in addition to our basic scope of work and hours, to be billed at standard rates specified in the contract between CSM and the District.

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	$150 per hour
Lead Consultant	$120 per hour
Specialist II	$90 per hour
Specialist I	$60 per hour

NOTE: ***Such service costs are not included in the cost of services amount in the contract for E-Rate***

15. **Final Summary**

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.

E-RATE SERVICES PRICING PROPOSAL

The total cost to San Leandro USD for CSM to provide the services set forth under the Scope of Services (excluding Additional Professional Services) is **$12,000.00 per year**. This proposal can be renewed or extended in one year or two year increments (up to two times) at the discretion of SLUSD, with any negotiated increase not to exceed 3%.

Additional pricing including surveys will be determined by the amount of hours estimated by District personnel and CSM required to complete all required documentation to utilize this alternate discount method. Please refer to ***Hourly Rates***, above.

Invoices for services will be provided monthly beginning at final contract execution and continuing through June 30, 2015.

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

1. Shall provide to District completed forms and processes related to all Priority One and Priority Two applications of the Federal Communications Commission E-Rate filings with the schools and library division ("SLD") for filing year 2015-2016 also known as Funding Year Sixteen (16). 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) and/or vendor specific discount forms (i.e. Data Gathering Form, Existing Services List, etc.)
        - Implementation Deadline Extension Request (ImDER)
        - Invoice Deadline Extension Request (IDER)
        - Service Provider Identification Number (SPIN)Change Requests
        - Service Substitution Requests
        - Service Certifications (standard)
    - Response to the following requests from USAC:
        - Program Integrity Assurance (PIA)
        - Selective Review Information Request (SRIR) related to a contracted filing year (current)
        - Payment Quality Assurance (PQA)
    - Invoice reconciliation for previous funding year disbursements

2. Up to two onsite meetings with District per funding year to assess technology and telecommunications needs as they relate to the upcoming application period.
3. Act as District's main point of contact with the SLD.

4. 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 for Year 16 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.** Until all issues with Year 16 E-rate are resolved.

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.**
   A. At the written request of the District, the Consultant will provide additional Professional Services based upon the following hourly rates.

Officer/Principal	$175 per hour
Information Technology Consultant	$150 per hour
Lead Consultant	$120 per hour
Specialist II	$90 per hour
Specialist I	$60 per hour

Such service costs are not included in the cost of services amount in the contract for E-Rate Compliance Services in **E-Rate Services Pricing Proposal** of this agreement. These Professional Services may include but are not limited to the following:

- RFPs/RFIs/RFQs, etc.
- Surveys (alternate discount method)
- Technical Specifications
- Comprehensive Technology Plan Writing
- Coordination of response to Special Compliance Reviews
- Assistance with procurement process

- Technology needs assessment, subject to guidelines provided by the District.
- Preparation of USAC and/or FCC appeals
- Technology Plan and Technology Plan Addenda preparation
- On-site audit support
- On-site meetings exceeding the quantity specified under "Consultant's Responsibilities" (including attendance at Board meeting or other special meetings)
- Preparation of documentation/reports/presentations for Board meetings or other special meetings
- Travel expenses for any non-inclusive on-site meetings including hourly rate, standard mileage reimbursement and actual accommodation/travel expense (including airfare if applicable)

B. If it is determined after **Master Technology Plan Review** that the District Technology Plan does not align with upcoming E-Rate applications, Consultant will work with the District to develop updated language as appropriate for filing a Technology Plan Addendum with CTAP (or USAC-certified Technology Plan Approver (TPA)) in compliance with program rules. The service will be provided at a fixed cost of $900 per year. The cost of this service is **not** included in the cost of services amount for Services relating to E-Rate in the Pricing Proposal of this agreement. **Comprehensive Technology Plan Writing** is also available as an **Additional Professional Service** (as defined in **Detailed Scope of Services**).

NOTE: ***This is for updates to current plans only.***

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

C. 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.

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

5. **Conflict of Interest.** No business or personal relationship exists between any school employee and the service provider.

6. **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.

7. **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.

8. **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.

San Leandro Unified School District
14735 Juniper Street
San Leandro, CA 94579

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

9. **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.

10. **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.

11. **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.

12. **Entire Agreement.** This Agreement, set forth as the "E-Rate Services Pricing Proposal", 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 Agreement.