**REQUEST FOR QUALIFICATIONS AND QUOTATION**

**RFQQ NO. 24-07**

**PROJECT TITLE: E-Rate Consultant & Coordinator**

**Cost Proposal Submitted by E-Rate Expertise, Inc.**

**Scope of Work:**

Below are lists of anticipated project tasks related to E-rate and Consortium Management including applications, compliance, project administration, outreach to new libraries, financial analysis, consortia management, and special services to individual libraries, etc.

**E-rate Activities:**

1. Tracks submission deadlines for applications and reimbursements and prepares required documentation for program participation.
2. Monitors USAC websites/list serves, researches issues and informs Library of changes to rules and procedures.
3. Fills out the online application forms (470, 471, and 486) on the E-rate Productivity Center (EPC), and the BEAR form on the On-Line Forms system, reviews the forms with staff and assists with electronic submittal and certification.
4. Prepares supporting documentation required for 470, 471 and BEAR forms based on invoices, RFPs, bids and reports received from Library staff.
5. Coordinates Library and Consortium responses to USAC questions regarding applications.
6. Assists Library if necessary to ensure credits are properly applied to bills and helps to respond to reimbursement inquiries from USAC.
7. Resolves various issues that arise with the individual service providers to ensure compliance with program rules.
8. Prepares summary reports of program projections and activity for Library’s financial and budget purposes.
9. Maintains annually updated list of contacts of E-rate service providers and USAC officials.
10. Sets up shared folders for required 10-year E-rate document retention and saves E-rate forms and related documents.

**Consortium Activities:**

**Outreach**

1. Emails and follow up calls to new libraries
2. Testimonials from pilots
3. “Sales” materials for marketing
   1. Benefits with concrete examples
   2. Explanation of costs and amount of aid included
   3. Security by dividing circuits
4. Database of contacts
5. Regional library meetings

**Financial**

1. E-rate total funding reports
2. Track charges for individual libraries
3. Work to create database for tracking and projecting costs and revenues
4. Identify and track ineligibles – due to budget or timing
5. Determine libraries that need subsidies

**Operational**

1. Consortium Agreement
2. Financial information for full disclosure
3. Prepare libraries for installations
   1. City partnerships
4. Get summary data of equipment and capacity libraries have in place, plus their affiliations w/ other cities/colleges etc.
5. K20 Interactions
6. Survey of budget resources

**First Year Costs:**

Given the infancy stages of this LibTech consortium program, I propose that we maintain an hourly rate for services to allow for maximum flexibility in addressing issues and projects as they arise. I project that the 2024 application year will have similar time requirements as the 2023 application year since we will need to continue to develop systems to efficiently track, monitor and document individual library needs and issues and also to dive into the extremely complex issues of processing invoices from the vendor, plus allocating costs and then billing the member libraries. Additional work will be required for outreach and attracting new members. Once we have these processes in place, it will reduce the time needed each year to handle the financial aspects of the program.

My hourly rate for 2024 is $172. This includes a 4.4% inflationary increase over my current contracted rate based on the April 2024 12-month inflationary increase published by the US Bureau of Labor Statics Consumer Price Index for the Seattle-Tacoma area. <https://www.bls.gov/regions/west/news-release/consumerpriceindex_seattle.htm>

Since I project the hours should be similar to, and possibly a little less than last year, the total contract amount should remain at $60,000 per year. I only charge for my time and there are no additional expenses to be included. I will collect and pay sales taxes as applicable. No allocations for subcontractors will be required.

**Subsequent Year Costs:**

My practice is to increase my hourly rate by the rate of inflation each year. After 2025 or 2026, the project should be established enough that we can see trends in the workload and we can work together to develop a flat rate fee, at least for the E-rate project tasks, at that time. The scope may also be expanded if other projects are added to the LibTech service offerings, such as computer and printer management.