



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee
From: Michael Simeone, Chief Technology Officer
Date: 09/09/2024
Re: Award of Agreement with E-Rate Online LLC

Answer all questions and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information	
Vendor Name:	E-Rate Online LLC
Doing Business as: (DBA)	N/A
Vendor Address:	200 Boston Post Road Suite 11, Orange CT 06477
Vendor Contact Name:	Marybeth Sagnella
Vendor Contact Email:	msagnella@erateportal.com
Is the contractor a minority or women owned small business?	No
Agreement/Contract Information	
New or Renewal Agreement/Contract?	New Agreement
Effective Dates: (mm/dd/yy) <small>Multi-yr. require Board of Aldermen approval</small>	From 07/01/2024 To 06/30/2027
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$35,000 per year Total 3 years: \$105,000.00
Funding Source Name: Acct. #:	19047200-56694 other Contractual Services
Contract #: <small>(Local or State)</small>	N/A



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Key Questions:

1. What specific service will the contractor provide:

E-rate Consulting Services RFP# 2024-RFP-076, Yearly E-Rate Form 470 and 471 application processing and consulting services to secure federal E-Rate funding for Network refresh and internet service discounts. See attached copy RFP response.

2. How was the contractor selected? **Attach appropriate supporting documents*

- Quotes
- Sealed Bid # _____
- Sole Source # _____
- RFP# 2024-RFP-076
- State Contract #
- Exempt Professional
 - Accountant
 - Actuary
 - Appraiser
 - Architect
 - Artist
 - Dentist
 - Engineer
 - Expert Professional Consultant
 - Land Surveyor
 - Lawyer
 - Physician/Medical Doctor

3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:

a. Please explain how the vendor was chosen? **Attach Vendor Proposal*

Vendor was originally approved by the F & O committee on 07/01/24 and the Board of Education on 07/08/24. However, what was not realized was that at the time of these approval, it was not known that the renewals from the previous RFP had run out. This reason this went unknown was the staff who original put the previous RFP together is no longer with NHPS. City Purchasing granted permission to go out for RFP to keep current services for 24-25 with two one-renewal options.

b. Who were the members of the selection committee? *(Minimum 3 members required)*



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Michael Simeone, Chief Technology Officer, Christopher R. Brown, IT Director,
Michael Trnik, Procurement Coordinator

4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?

N/A

5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much? **Attach Renewal Letters*

N/A

6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?

N/A

7. Is this a service that existing staff could provide? Why or why not?

N/A



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Agreement/Contract Processing Checklist

To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.

Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement Contract Checklist\2022-2023

1. Has this vendor performed service(s) in prior fiscal years?	
If Yes,	Vendor # <u>46194</u>
If No or New,	Vendor must provide completed W9
2. A quotes or proposal submitting regarding the agreement/contract.	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u> It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor <u>must match rider specifications outlined.</u> Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite



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Rider 355	Professional Services – Cyber – Offsite
4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.	
Emailed Disclosures are acceptable.	



Consulting Fees / Cost Proposal

YEAR	TERM	COST*
1	July 1, 2024 – June 30, 2025	\$35,000.00
2	July 1, 2025 – June 30, 2026	\$35,000.00
3	July 1, 2026 – June 30, 2027	\$35,000.00

**ERO agrees to hold our fees flat for the duration of the contract if renewal options are exercised.*

Technical Proposal

ERO's approach is much different than other consulting firms; we believe that clients are paying for direction and guidance, not just form filing. Every 470 posted, FRN requested, and PIA response can and does affect the next funding year. Therefore, our services cover all open E-Rate funding years and E-Rate related items during the duration of the contract term. We will designate a single point of contact to provide on-demand assistance for E-Rate related questions who will respond within one business day to all questions.

1. Assist with preparation of district technology plan. Assist with pushing plan through CT state Education department for state approval and coordinating submission of plan through SLD as needed. E-Rate no longer requires Technology plans however we can assist as needed.
2. Support the NHPS in all phases of the ERATE application and monitoring process.
3. Review district compliance with SLD requirements including CIPA (Children's Internet Protection Act).
4. Assist in development of district Request for Proposals (RFP) for services eligible for ERATE discount and timing of postings of RFPs to New Haven City Web site to meet ERATE compliance.
5. Prepare and submit district's Form 470-Description of Services Requested.
6. Coordinate and participate, from the ERATE compliance perspective, in the evaluation of bids from service providers. Provide NHPS IT Manager/designated NHPS officials with compliance information for use in the decision-making process.
7. Assist with discount percentage determination including alternative discount mechanisms. This includes assistance with coordinating the ERATE free and reduced lunch survey and discount percentage process.
8. Prepare and submit district's Form 471-Services Ordered. And provide a timetable of events that reflects key dates when information is needed, forms completed and submitted from first form to SLD through receipt of SLD approvals.
9. Ensure Forms 470 and 471 are properly submitted within filing window and certified.
10. Review Receipt Acknowledgement Letter for accuracy and submit corrections to SLD as needed.
11. Communicate with SLD Program Integrity Assurance personnel as needed to ensure reviewers receive an accurate and timely response.
12. Review Funding Commitment Decision Letter (FCDL) for accuracy. Prepare and submit appeal letters as needed.
13. Prepare and submit Forms 486, 472 and 500 as necessary for collection of ERATE discounts on behalf of the district.
14. Prepare and submit appeal letters, Service Provider Identification Number (SPIN) change requests, service substitutions, change of invoicing mode, contact change letters, and other requests as needed to maximize district's ERATE discounts.
15. Represent district through all phases of an on-site audit or Bearing Point site visit.
16. Help track billing and payments for all ERATE vendors that have won RFPs and are doing ERATE project related work for the NHPS. If the selected vendor is not an incumbent they must insure that the transition process from the existing ERATE consultancy firm is seamless with no ERATE service issues. Identify ways new vendor would review current filings already submitted and comment on any ways they should be changed and why.
17. Successfully keep records on all aspects of the NHPS ERATE program.

18. Completely understand and correctly apply, when working with or on behalf of NHPS, CT state/municipality procurement policies. This includes both New Haven procurement policy and the CT state procurement policies generally applied to its municipalities.
19. S. As needed participate in monthly meetings to discuss the status of the NHPS ERATE program with: COO, IT Manager, or/and other NHPS officials and consultants. E-RATE ONLINE’s office is located in Orange, CT making in-person meetings available at any time.
20. T. As needed participate as decision committee members, to validate ERATE Compliance, for ERATE RFPs.
21. U. Provide guidance to and cooperate with NHPS officials or their designees in regards to all aspects of the ERATE program. The selected firm will in fact be the ERATE expert for the NHPS.
22. V. All respondents must provide a staff roster with credentials and a list of current customer references.
23. W. As needed provide guidance to the School Construction Office regarding ERATE eligibility for technology designs used at schools under construction.
24. X. The selected vendor must indicate any percentage of cost increases that could result if they are renewed at the end of the term. Please note: The City of New Haven has the option of extending or renewing these agreements for a period not to exceed two (2) additional twelve (12) month periods at a price not to exceed the published 2025 and 2026 U. S. Bureau of Labor Statistics Consumer Price Index (CPI), Northeast Region. For example, if a renewal is requested in May of 2025 for the following fiscal year of 2025-2026, if there is a requested increase by a vendor, it cannot exceed the published 12-month CPI rate from April of 2024 to May of 20-25.
E-RATE ONLINE agrees to hold the cost with no increase over the three year period.

22V - ERO Staff Roster:

David Cornet	Managing Partner
Mary Jo Sagnella	Chief Operations Officer
Karen Pavon	Operations Manager
Amy Krom	Senior Account Manager
Amanda Miguel-Rua	Senior Account Manager
Brian Grimmer	Senior Account Manager
Alexa Mulligan.....	Account Manager
Erin Prentice	Account Manager
Deyanir Gomez.....	Account Manager
Eddy Morales.....	Account Manager
Belinda Hoang.....	Account Manager
Jaquille Wilson.....	Asst Account Coordinator

22V. Current Customer References

New Haven Public Schools
Michael Simeone
msimeone@newhavenct.gov
203 946-4979

Hartford Public Schools
Joel Figueroa
Joel.figueroa@hartfordschools.org
860-757-9467

East Hartford Public Schools
Roberta Pratt
Pratt.rj@easthartford.org
860-622-5150

Boston Public Schools
Solimar Cruzado
scruzado@bostonpublicschools.org
617-635-9190

St.Vrain Valley School District
Gina Lacy
Lacy_gina@svvsd.org
303-702-7709



Current Connecticut Clients

Achievement First	CT
American School for the Deaf	CT
Andover School District	CT
Ansonia Public Schools	CT
Area Cooperative Educational Services	CT
Avon Public Schools	CT
Berlin Public Schools	CT
Bethany Public School District	CT
Bethel Public Schools	CT
Bloomfield Public Schools	CT
Bolton Public Schools	CT
Branford Public Schools	CT
Brass City Charter School	CT
Bristol Public Schools	CT
Brookfield Public Schools	CT
Brooklyn Public Schools	CT
Canterbury School	CT
Canton Public Schools	CT
Cheshire Public Schools	CT
Children's Learning Centers of Fairfield County	CT
Clinton Public Schools	CT
Colchester Public Schools	CT
Common Ground High School	CT
Connecticut Technical Education & Career System	CT
Cooperative Educational Services	CT
Coventry Public Schools	CT
Cromwell Public Schools	CT
Danbury Public Schools	CT
Darien Public Schools	CT
Diocese of Bridgeport Schools	CT
Eagle Hill School	CT
East Haddam Public Schools	CT
East Hampton Public Schools	CT
East Hartford Public Library	CT
East Hartford Public Schools	CT
EASTCONN	CT
Easton School District	CT
EdAdvance	CT
Edith Wheeler Memorial Public Library	CT
Ellington Public Schools	CT
Glastonbury Public Schools	CT
Goodwin College Educational Services	CT
Groton Public School District	CT
Grumann Hill Montessori / Seven Acres	CT



Guilford Public Schools	CT
Hamden Hall Country Day School	CT
Hamden Public Schools	CT
Hartford Public Schools Consortium	CT
Highville Charter School	CT
Integrated Day Charter School	CT
Isaac School	CT
Killingly Public Schools	CT
King School	CT
LEARN Regional Educational Service Center	CT
Lebanon Public Schools	CT
Ledyard Public Schools	CT
Lisbon School District	CT
Litchfield Public Schools	CT
Manchester Public Schools	CT
Marlborough School District	CT
Marvelwood School	CT
Middletown School District (CT)	CT
Monroe Public Schools	CT
Montville Public School District	CT
Naugatuck Public Schools	CT
New Beginnings Family Academy	CT
New Britain School District	CT
New Canaan Public Schools	CT
New Fairfield Public Schools	CT
New Haven Public Schools	CT
New London Public Schools	CT
New Milford Public Schools	CT
Newington Public Schools	CT
Newtown Public Schools	CT
North Branford Public Schools	CT
North Haven Public Schools	CT
Norwalk Public Library	CT
Norwalk Public Schools	CT
Norwich Public Schools	CT
Odyssey Community School	CT
Orange Public Schools	CT
Oxford Public Schools	CT
Plainville Public Schools	CT
Plymouth Public Schools	CT
Portland Public Schools	CT
Preston Public Schools	CT
Rectory School	CT
Redding School District	CT
Regional School District 06	CT
Regional School District 08	CT



Regional School District 09	CT
Regional School District 12	CT
Regional School District 13	CT
Regional School District 14	CT
Regional School District 17	CT
Regional School District 18	CT
Regional School District 20	CT
Ridgefield Academy	CT
Ridgefield Public Schools	CT
Sacred Heart Academy	CT
Seymour Public Schools	CT
Shelton Public Schools	CT
Simsbury Public Schools	CT
South Windsor Public Schools	CT
Southington Public Schools	CT
St.Luke's School	CT
Stamford Public Schools	CT
Stonington Public Schools	CT
Stratford Public Schools	CT
Suffield Public Schools	CT
The Ferguson Library	CT
Thomaston Public Schools	CT
Thompson Public Schools	CT
Tolland Public Schools	CT
Torrington Public Schools	CT
Town of Rocky Hill	CT
Trumbull Public Schools	CT
Vernon Public Schools	CT
Wallingford Public Schools	CT
Waterford School District	CT
Watertown (CT) Public Schools	CT
West Hartford Public Schools	CT
West Haven Public Schools	CT
Weston Public Schools (CT)	CT
Westport Public Schools	CT
Wethersfield Public Schools	CT
Wheeler Clinic	CT
Wilton Public Schools	CT
Winchester Public Schools (CT)	CT
Windham Public Schools	CT
Windsor Locks Public Schools	CT
Windsor Public Schools	CT
Wolcott Public Schools	CT
Woodbridge Public Schools	CT