



E-RATE • FUNDING YEAR 2027

Competitive Bidding Made Simple

A friendly guide to the FCC Form 470 for schools and libraries, with questions to ask yourself at every step

Presented by Kellogg & Sovereign Consulting



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YOUR ROADMAP

Five steps to a compliant bid

1

Get Ready

Plan the scope,
check eligibility and
local rules

2

File Form 470

Describe your
needs and upload
every bidding
document

3

Open & Fair

Same information
for every bidder,
no gifts

4

Wait 28 Days

Count calendar
days from the day
you certify

5

Select & Sign

Price of eligible
services weighs
the most



After each step: an “Ask yourself” checklist to review with your team.

WHY IT MATTERS

Non-compliant bidding is the most common reason E-Rate funding is denied.



What it is

The formal process for choosing the providers who will deliver your E-Rate equipment and services.

How it works

Vendors read your Form 470 and any RFP on USAC's site, then send you bids.

Don't go it alone

Bring in your procurement office, business official, county office or legal counsel.

KEY DATES

The FY2027 timeline at a glance

BID • FORM 470

Jul 2026 – Feb 2027*

Certify early to leave time for evaluation and contracts.

APPLY • FORM 471

Jan – Mar 27, 2027*

Contracts must be in place before you file.

START • FORM 486

Jul 1, 2027 – Jun 30, 2028

The funding year your services run.

INVOICE • 472 / 474

Jul 2027 – Oct 2028

Recurring services; non-recurring through Jan 2029.

* Typical timeline from USAC, subject to change. Confirm the filing window dates each year.

STEP 1 • GET READY

Plan before you post



Scope your project

List the equipment and services you need, where, and how much.



Know your rules

Review state, local and board procurement requirements that apply.



Check eligibility

Use this year's Eligible Services List; confirm entity and service eligibility.



Use the Guiding Statements

USAC's FY2027+ table helps you pick the right Form 470 drop-downs.

TIP

Not sure if it's Internal Connections or BMIC? You may request bids for both.

STEP 1 • GET READY

Watch for “mixed eligibility”

When only part of an item is eligible, you must split eligible and ineligible costs.

MIXED COMPONENTS

A data circuit (eligible) with channels set aside for voice (ineligible).

MIXED USES

A server used for caching (eligible) and video distribution (ineligible).

MIXED LOCATIONS

Broadband to a church-run school (eligible) and the church office (ineligible).



There’s no single approved method. Use tangible criteria that produce a reasonable split.

ASK YOURSELF • STEP 1

Are we ready to request bids?

- 1 What exactly do we need, and have we checked it against this year's Eligible Services List?
- 2 Which state, local and board procurement rules apply to us, and who owns them?
- 3 Do any items have mixed eligibility, and how will we allocate those costs?
- 4 When do our current contracts end, and which services must be rebid this year?
- 5 Who needs to be involved: business office, procurement, legal, our E-Rate consultant?

STEP 2 • FILE THE FORM 470

Tell bidders exactly what you need

What goes in it

- **Category 1:** service type, bandwidth, locations
- **Category 2:** make, model, quantity, locations
- Specific descriptions, never generic ones
- Every RFP or bidding document, uploaded in EPC

When to file

- Every year for month-to-month, tariffed or new services
- At least 28 days before your Form 471
- Again if a contract needs changes the original 470 didn't cover
- Not needed for multi-year contracts still in scope

RARE EXEMPTIONS

Low-cost internet (100/10 Mbps, \$3,600 or less a year per location) and, for libraries only, Category 2 at \$3,600 or less a year per location.

STEP 2 • FILE THE FORM 470

If it tells bidders anything, upload it

Any document outside the Form 470 that shares bidding information counts as an “RFP”, formal or informal.

RFP / RFQ / RFO / IFB

Newspaper ads

Site lists

Required legal forms

Bidder conferences & job walks

Due date, time & place

Scope of work

Last day for questions

Evaluation criteria

Disqualification factors

Addenda and Q&A answers



Some services, such as leased dark fiber and self-provisioned networks, always require an RFP.

STEP 2 • WHAT'S NEW

Changes this year, and one big one ahead

FY2027 • NOW

Form 470 updates

- Clearer guidance on the Category 2 screen
- Bus Wi-Fi and hotspots removed (ineligible)
- More manufacturer options
- “Or equivalent” built into “Other”

FY2028 • COMING

USAC bidding portal

- Vendors submit bids in a USAC-managed portal
- Applicants upload bid evaluations, vendor selection documents and contracts there
- Source: FCC Order FCC-26-30

ASK YOURSELF • STEP 2

Is our Form 470 complete?

- 1 Have we described services specifically enough for vendors to bid accurately?
- 2 Is every bidding document, including addenda and Q&A, uploaded to the 470 in EPC?
- 3 Did we select every service we might need, including installation and BMIC?
- 4 Did we request enough bandwidth for upgrades over the full contract term?
- 5 Do the services on our Form 470 and our RFP match exactly?

STEP 3 • OPEN AND FAIR

Same information, same treatment

Open

No secrets. What one bidder learns, every bidder learns.



Potential bidders can't write your RFP or prepare your Form 470.



State disqualification factors in the 470 or RFP, visible to all bidders.

Fair

Every bidder is treated the same, fairly and equally.



Allow "or equivalent"; no preference for a brand or technology.



No relationships or ownership ties that could sway the outcome.

Disqualifier examples: no SPIN (498 ID), no FCC Registration Number, not bonded, not registered with the state.

STEP 3 • THE GIFT RULES

Gifts from vendors are off-limits, all year round

\$20

or less per item, including meals
and prizes

\$50

maximum from one vendor to one
person per funding year



Those are the only exceptions. The rules apply to everyone involved in E-Rate, not just during bidding.

ASK YOURSELF • STEP 3

Is our process truly open and fair?

- 1 When one vendor asked a question, did we share the answer with all bidders?
- 2 Did we add “or equivalent” wherever a brand or model is named?
- 3 Are our disqualification factors written into the Form 470 or RFP?
- 4 Did any potential bidder help write our RFP or Form 470?
- 5 Has anyone on our team accepted gifts, meals or prizes from a vendor this year?

STEP 4 • WAIT AT LEAST 28 DAYS

Count the days from certification



Example: certify on **January 1** and your Allowable Contract Date is **January 29**. It's printed on your Receipt Notification Letter.

- Weekends count**
It's 28 calendar days, not business days.
- No bid deadline?**
Accept bids until you start evaluating.
- Local rules**
Your state may require a longer wait.



STEP 4 • WHEN THINGS CHANGE

Changed something? Know which clock resets

EXTEND 28 DAYS

Substantial change

- Adding or removing locations
- Address or bandwidth changes
- New service or transmission type
- Category 2: make, model or quantity changes

FILE A NEW 470

Not correctable

- Bandwidth not listed on the 470
- Quantities that differ from the 470
- Service types missing from the 470
- Cancel the old 470 once the new one is certified



In EPC, answer “Yes” to the substantial-change question when uploading a new RFP and the Allowable Contract Date moves 28 days automatically.

Are we counting the days correctly?

- 1 On what date did we certify the Form 470, and what is our Allowable Contract Date?
- 2 Did we set a bid deadline, and is it at least 28 days after certification?
- 3 Has anything we changed or answered counted as a “substantial change”?
- 4 Do our state or local rules require a longer waiting period?
- 5 Are we recording the date each bid arrived, and any late bids we rejected?

STEP 5 • SELECT A PROVIDER

Choose the most cost-effective bid



Price comes first

The cost of eligible services must be your most heavily weighted factor.



One winner

Each evaluation has only one most cost-effective bidder. No awards by ranking.



Screen, then score

Yes/no checks are fine if stated in the 470 or RFP. Document every disqualification.

THEN SIGN

Have a signed contract or legally binding agreement before you file the Form 471, and upload it to your EPC Contract Profile.

STEP 5 • BID EVALUATION MATRIX

Score every bid the same way

Evaluation factor	Weight
Price of eligible services (highest)	40%
Technical solution	20%
Prior experience	15%
Local support and service	15%
References	10%

Example only. You choose the factors and weights; eligible price must weigh the most.



Never combine eligible and ineligible costs in one price factor.



Explain each score with tangible criteria.



USAC may ask who scored the bids and for their notes.

STEP 5 • SPECIAL CASES

No bids, or only one? You still have options

Reach out

After 28 days, actively ask vendors for bids, including your current provider.

Accept one bid

A single bid can win if it is cost-effective.

Use a bill

For unchanged recurring services, a bill that meets the 470 specs may count as a bid.

Existing contract

In an informal process, it may be accepted as a bid if it meets the specs.

Formal RFP?

Check with purchasing; re-bidding may need board approval.

Always: write a memo

Record what you received and what you did next.

STEP 5 • LAYERS OF RULES

Follow every rule, and the strictest one wins

FEDERAL • E-RATE

Form 470, 28 days, open and fair, most cost-effective. Bid everything, even under local limits. No sole sourcing.

STATE LAW

e.g. California's Public Contract and Education Codes: newspaper ads, public bid openings, bid thresholds.

LOCAL POLICY

Board, district and county policies may add steps, limits or, in some cases, relief.

STATE MASTER CONTRACTS

Cite the state's Form 470. If several vendors hold the contract, run a mini-bid among all who can serve you.

COMMON PITFALLS

Seven mistakes that cost funding

1 • No Form 470

Almost every request must cite one. Watch contract end dates.

2 • Missing services

Select installation and, if in doubt, BMIC.

3 • Bandwidth cap

Upgrading past the 470's maximum can be denied. Plan ahead.

4 • Substantial change

Restart the 28 days before you evaluate or award.

5 • Mixed costs

Don't score eligible and ineligible costs together.

6 • No "or equal"

Rejecting equivalent products can lead to denial.

7 • Private answers

Answering one vendor only breaks the open and fair rule.

Avoid them all

Use the "Ask yourself" checklists.

ASK YOURSELF • STEP 5

Could we defend our choice to USAC?

- 1 Is the price of eligible services the most heavily weighted factor in our matrix?
- 2 Did we keep eligible and ineligible costs in separate scoring factors?
- 3 Can we explain every score with tangible, written reasons?
- 4 Is a signed contract or legally binding agreement in place before we file the 471?
- 5 Are all bids, matrices, memos and emails saved where we can find them in 10 years?

KEEP YOUR RECORDS

If it isn't documented, it didn't happen

10

years

after the later of the funding year's end or the service delivery deadline

RFP documents

Winning bids

Losing bids

Vendor emails and Q&A

Evaluation matrices

No-bid or one-bid memos

Bid receipt dates

Signed contracts

WHO DOES WHAT

Applicants and providers each have a role

Schools and libraries

- Decide what's needed and file the Form 470
- Run the bidding; pick the winner on eligible price first
- Answer PIA review questions
- File Forms 471, 486, 472 and others

Service providers

- Send responsive bids that separate eligible costs
- Never help an applicant they plan to bid for
- No gifts, freebies or non-E-Rate discounts
- Offer the Lowest Corresponding Price



Both sides document compliance and keep records for 10 years.

KEEP LEARNING

Helpful resources

USAC bidding infographic

[The whole process on one page](#)

28-day waiting period

[USAC's guide and calendar](#)

Form 470 videos

[Short how-to videos from USAC](#)

Guiding Statements Table

Pick the right Form 470 services (FY2027+), on usac.org

Eligible Services List

Check what's eligible this funding year, on usac.org

USAC help desk

(888) 203-8100, Mon–Fri, 8 a.m.–8 p.m. ET



Questions?

Your Kellogg & Sovereign team is here to help you plan, bid and file with confidence.