

Collect - Ed LLC

PO Box 333
Mustang, OK 73064
Ph: 405.830.2200 Fax: 405.376.7237
eFax: 501.640.7815
www.collect-ed.com

May 23, 2024

JEFFERSON INDEP SCH DISTRICT
Jay Patrick
1600 Martin Luther King Drive
Jefferson, TX 75657

Dear Jay Patrick:

I would like to thank you for choosing COLLECT-ED for your E-Rate Consulting Services. Our main goal is to save your school district time and money in handling your E-Rate program and funding collections.

For the upcoming Erate filing year 2025-2026, we need to receive completed agreement packet:

- ✓ 1. COLLECT-ED LLC E-Rate Services Agreement
 - Please review terms.
 - Sign and Date Contract
 - Issue a Purchase Order for Erate Consulting Services or TIPS Contract #210201
 - Fax signed contract to (501) 640-7815
- ✓ 2. Letter of Authorization
 - **Please print or type the attached letter on School Letterhead**
 - Sign and Date Letter
- ✓ 3. Confidentiality and Non-Disclosure Agreement
- ✓ 4. CONTACT FORM
- ✓ Submit all forms by EMAIL – collect-ed@hotmail.com or FAX 501-640-7815

Please return all information **as soon as possible**. **NO LATER THAN AUGUST 1, 2024.**

After we received your contract and requested information, we can start your E-Rate Form 470 as soon as USAC opens applications.

We look forward to assisting your school district in your E-Rate program.
If you have any questions or concerns, please contact my office.

Sincerely,



Machelle L. McKay
E-Rate Consultant
collect-ed@hotmail.com

#140691 - JEFFERSON INDEP SCHOOL DIST

- Summary
 - Customer Service
 - Modifications
 - Additional Information
 - Discount Rate
 - Category Two Budget
 - Contracts
 - FCC Forms
 - FRN Appeals
- News Related Actions

Category Two Budget Status

Category Two Budget information presented below reflects data starting in FY2016.

▼ 2021 - 2025

▼ 2021 - 2024 (Budgeted Entity)

> Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Confirmed	\$197,511.00	\$181,383.87	\$49,727.52	\$231,111.39	(\$33,600.39)	Hide Details

Category Two Budget Details

Funding Year	Budget Status	Budget	Funding Year In-Review Requested Costs	Total In-Review Requested Costs	Funding Year Committed Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
2021			-	-	-	-	-	-
2022			-	-	-	-	-	-
2023	Confirmed	\$197,511.00	\$0.00	-	\$49,727.52	-	-	-
2024			\$181,383.87	\$181,383.87	\$0.00	\$49,727.52	\$231,111.39	(\$33,600.39)

SHOW ALLOCATION BREAKDOWN

▼ 2015 - 2020

Your district's schools manage the Category Two Budget information for the FY2015 to FY2020 budget cycle. Please visit the associated school profiles for more details.

Erate Form Services Agreement (2025-2026)

This agreement is between:

Machelle McKay DBA Collect-Ed LLC, a proprietorship, located at PO Box 333, Mustang, OK, 73064,
Hereinafter – “CE” And..

JEFFERSON INDEP SCH DISTRICT, located at 1600 Martin Luther King Drive, Jefferson, TX 75657
Hereinafter – “JEFFERSON ISD”

By our signatures below, “CE” and “JEFFERSON ISD” agree to the following terms and conditions:

“CE” responsibility includes:

- “CE” will use it’s best efforts to prepare the appropriate paperwork and forms on behalf of the client, commonly referred to as Form 470, 471, 486, and 500 (including SPIN Change requests, Service Substitution requests) in obtaining E-Rate funds from the Universal Service Administrative Company “USAC”, for the funding year stated above.
- “CE” has no control over the USAC any changes in rules and regulations or evaluation process, it is agreed and understood that “CE” can not guarantee approval from the USAC.
- “CE” will notify the school (or entity) of any changes in rules and regulations of the E-Rate program.
- “CE” is not responsible for any E-Rate bids or contracts to other vendors. “CE” does not recommend vendors; however, is able to publicly advertise any request for proposals (RFP). “CE” is able to submit a list of active eligible “E-Rate Service Providers” (vendors).
- “CE” is able to assist in preparing a Request for Proposal (RFP) for E-Rate eligible services, upon request of the school (entity). – Extra charges may apply.
- “CE” will notify each entity of upcoming deadlines set forth by the USAC and submit all forms necessary to the applicant for approval and signature before any deadline.
- “CE” is able to answer questions on behalf of the entity from USAC representative (s).
- “CE” will answer any questions or concerns of the entity as requested.
- “CE” provides a value added services to its customers by continuous E-Rate services: such as reporting to all entities upcoming deadlines, monthly review of “CE” services provided to each entity as well as a “End of Funding Year report” which provides a reconciliation by Funding Request Number (FRN).

“JEFFERSON ISD” responsibility includes:

- “JEFFERSON ISD” agrees to comply with all the rules and regulations set forth by the USAC. Including, but not limited to the 28-day bidding process, compliance and truthfulness of each FCC Form (470, 471, 486, and 500), allocation of “E-Rate” funds and deadlines set forth by the USAC.
- “JEFFERSON ISD” agrees to the bidding process set forth by the USAC:
 - Provide a list of services or products to be included in the bid process for which they are seeking “E-Rate” funds (to include telecom, internet and / or internal connections)
 - Any and all state or local bidding restrictions and/or regulations before the Form 470. These regulations may include bonding requirements, public advertising for RFPs, etc.
 - The bidding process set forth by the USAC is 28-days from the date the Form 470 is posted. This time frame allows potential vendors to review the list of services and provide equal opportunity to respond to the RFP for the services in which they provide. **All qualified service providers chosen must have SPIN number to participate in E-Rate process.**
 - Any formal RFP that is written from the school (or consultant) must be written before the Form 470 is posted. If a supplemental RFP is written by consultant, additional charges may apply. The formal RFP process provides more specific information to vendors of particular products or services that the school is seeking. The RFP will be publicly advertised for any qualified vendor to view and respond.
 - “JEFFERSON ISD” is responsible for all E-Rate bids or contracts to service providers.
- “JEFFERSON ISD” agrees to provide any information required to obtain “E-Rate” funds, such as, approved Technology plan, copies of invoices, budget / lunch count information, USAC certifications, etc. within the time allowed by either “CE” or the USAC.

- **"JEFFERSON ISD"** agrees to review and approve ALL E-Rate forms before submitting them to the USAC. The named legal representative of the school (or organization), such as the superintendent, will be required to sign and date each FCC form.
- **"JEFFERSON ISD"** agrees to communicate any information from the USAC to **"CE"** within 3-5 working days; however, **"CE"** will be listed as the contact on each of the FCC Forms.
- **"JEFFERSON ISD"** agrees to retain any and all "E-Rate records for a minimum of TEN (10) years from the last date of service. This is a E-Rate requirement set forth by the USAC. (a list of type of records will be provided to the school from **"CE"**)
- **"JEFFERSON ISD"** agrees to sole responsibility to follow all rules and regulations set forth by the USAC and the FCC (Federal Communications Commission).

Terms of payment:

- It is agreed to and understood by both parties that no monies will be paid by **"CE"** for any reason, and that **"CE"** does not guarantee or bear responsibility in anyway, for the approval, payment and receipt of these funds.
- Any restitution for liability will not exceed the paid amount of this contract.
- School (or entity) –if required for payment, to issue Purchase Order to secure funds to pay for services to be rendered.
- Upon receipt of services rendered, an invoice will be submitted to school district for payment. All invoices submitted will require payment within 30days. (1/3 due after each application – 470, 471 and 486. if necessary, Form 472 &/or 500)
- This contract may be cancelled before ANY services are rendered with a 30 day written notice. Otherwise, if cancelled during contract term, **"JEFFERSON ISD"** agrees to cancellation charges equal to the BALANCE OF CONTRACT AMOUNT considering all services were rendered as promised (within the contract funding year) and payment is due within 15 business days.
- Fees are due for services provided by **"CE"** unless otherwise agreed to in a separate agreement.

Basic E-Rate Consulting Services	<u>CAT1 (Telecom & Internet)</u>	<u>CAT2 (Basic Maint & Internal Connections)</u>
ESTIMATED CONTRACT: <i>See pricing schedule attached</i>	\$2,000.00	If used: <i>See pricing schedule attached</i>
ESTIMATED USAC DISCOUNT % INFORMATION		
CAT1 – INTERNET & TRANSMISSION SERVICES (TELECOM)	80 %	-
CAT2 – INTERNAL CONNECTIONS & BASIC MAINT. OR MANAGED SERVICES	-	80 %
PRE-DISCOUNT AMOUNT FILED IN PREVIOUS FUNDING YEAR (2024-2025)	\$ 31,680.00	\$ 145,107.09
OPTIONAL SERVICES: (Additional charges may apply) - See pricing schedule attached		
Contract management - for ongoing (upgrades or changes) separate & apart from E-Rate eligible services	\$ 100.00 / per contract	\$ 100.00 / per contract

Machelle McKay

Authorized Signature

Collect – Ed, LLC Rep Signature

Name of Authorized Official (Printed or Typed)

Machelle L. McKay

Title of Authorized Official

Consultant

Date

5/23/2024

School Board Approved Date: _____ (If necessary)

Purchase Order (or TIPS) # _____

FUNDING YEAR CONTRACT
Contract expires: June 30, 2026

Pricing Model is CONFIDENTIAL and not to be shared with other E-Rate Consultants or competitors

CAT 1 - TELECOMMUNICATIONS AND INTERNET ACCESS

CAT 1 RANGE	0-10k	10k-25k	25k-50k	50k-75k	75k-125k	125k-250k	250k-500k	500k-999k	1m+
Basic Erate Consulting - Minimum annual contract charges (470, 471, 486, 500)	\$ 350.00	\$ 1,000.00	\$ 2,000.00	\$ 3,000.00	\$ 4,000.00	\$ 5,000.00	\$ 7,000.00	\$ 7,500.00	\$ 10,000.00
CONTRACTED AS ANNUAL TERM - Divided by 3 as services rendered (details per service charge);									
FORM 470 (based on previous year funding); including written RFP and CAT2 requests	\$ 100.00	\$ 300.00	\$ 500.00	\$ 750.00	\$ 1,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 3,000.00
FORM 471- MINIMUM \$150	2.50%	2.50%	2.00%	2.00%	1.50%	1.00%	0.75%	\$ 2,500.00	\$ 4,000.00
UPON FUNDING APPROVED FORM 486 - MINIMUM \$100.	2.50%	2.50%	2.00%	2.00%	1.50%	1.00%	0.75%	\$ 2,500.00	\$ 3,000.00
FORM 472 - additional charges will apply per services rendered									
FORM 472; per request (based on actual collection)- MINIMUM \$200/per application	2.50%	2.50%	2.00%	2.00%	1.75%	1.50%	1.00%	0.75%	0.50%

add

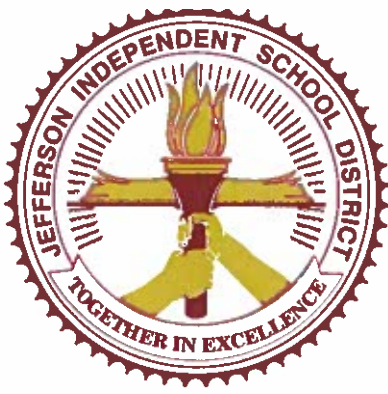
**CAT 2 - INTERNAL CONNECTIONS, BASIC MAINTENANCE & MANAGED INTERNAL BROADBAND SERVICES
(ONLY IF FILING FOR CAT 2)**

CAT 2 RANGE	0-10k	10k-25k	25k-50k	50k-75k	75k-125k	125k-250k	250k-500k	500k-999k	1m+
FORM 471- MINIMUM \$250.	2.50%	2.00%	1.50%	1.50%	1.25%	0.75%	0.45%	0.35%	0.25%
UPON FUNDING APPROVED FORM 486 - MINIMUM \$250.	2.50%	2.00%	1.50%	1.50%	1.25%	0.75%	0.45%	0.35%	0.25%
FORM 472 - additional charges will apply per services rendered									
FORM 472; per request (based on actual collection)- MINIMUM \$200/per application	2.50%	2.50%	2.00%	2.00%	1.75%	1.50%	1.00%	0.75%	0.50%

ADDITIONAL CHARGES

additional FORMS 470, 471, 486 (request per form)	\$ 100.00	
APPEALS - USAC or FCC	\$ 350.00	
SPIN CHANGE (per customer or service provider order) each request	\$ 50.00	
Service Substitutions - (per customer or service provider order) each request.	\$ 100.00	
ADDITIONAL HOURLY RATE (for miscellaneous projects, contract management as needed) - minimum charge = 3 hours	\$ 50.00	* Contract management - for ongoing Telecom & Internet Access services (email, webhosting) separate & apart from E-Rate eligible services
HOURLY RATE - ONSITE SERVICES, including travel time (only if required or requested) - plus per diem for expenses	\$ 50.00	
PER DIEM = Cost of Travel (flight or rental car) & Lodging		actual charges

Pricing Model is CONFIDENTIAL and not to be shared with other E-Rate Consultants or competitors



Jefferson Independent School District

1600 MLK Drive Jefferson, Texas 75657 (903) 665-2461 Fax (903)665-7367

May 22, 2024

To whom it may concern:

This Letter of Authorization, provides E-Rate Consultant, Machelie L. McKay DBA Collect – Ed, LLC permission to assist, JEFFERSON INDEP SCH DISTRICT (BEN# 140691) in the processing and collection of our E-rate Program for funding year 2025-2026. E-Rate Consulting services to begin as of dated signed below.

Please use this letter as your authorization to provide the necessary information as requested by Collect - Ed LLC concerning this effort. For example, but not limited to:

- E-Rate application information (470, 471, 486, 472 and 500); via USAC EPC portal
- Service Provider account information including on-line billing access;
- Service Provider E-Rate Form signatures (472, Block 4)
- Authorized Signature may be used on electronic forms.
- Etc. (any other information necessary for Billing and/or E-Rate purposes).

This authorization is valid throughout the duration of the E-Rate process, to begin as this letter is dated and ending June 30, 2024 unless any further work is required to complete the funding year documents such as final BEAR forms, appeals, etc.

I, certify that our school district respects and complies with any and all the rules and regulations of the Universal Service Administrative Company (USAC). Including all form certifications, as stated on such forms: 470; 471; 486; 472, 500, appeals, service substitutions, etc.

Thank you for your assistance.



Authorized Signature

Jay Patrick

Printed Name

Director of Technology

Title

Date



PO Box 333
Mustang, OK 73064
Ph: 405.830.2200 Fax: 405.376.7237
eFax: 501.640.7815
www.collect-ed.com

CONFIDENTIALLY AND NON-DISCLOSURE AGREEMENT

FUNDING YEAR: 2025-2026

THIS CONFIDENTIALLY AND NON-DISCLOSURE AGREEMENT dated this _____ day of _____ of 2024.

BETWEEN:

COLLECT-ED LLC
PO Box 333 Mustang, OK 73064
Machelle McKay
(the "Consultant")
OF THE FIRST PART

-AND-

JEFFERSON INDEP SCH DISTRICT
1600 Martin Luther King Drive
Jefferson, TX 75657
(Collectively and individually the "Client") OF THE SECOND PART

Below I have listed the details of the "Confidentially and Non-Disclosure" agreement:

- i. All Documentation and Business Processes and Practices transferred between "Client" and "Consultant" are to be used exclusively for the completion of the E-Rate Grant Program for all working funding years (current and previous).
- ii. Service Providers, Universal Service Administration Company (USAC) and the Federal Communications Commission (FCC) are the only third parties that may request documentation copies to complete the E-Rate process.
- iii. Documentation, Business Processes and Practices provided by COLLECT-ED may not be sold or reused without written permission by the rightful owner.

Machelle McKay, Consultant

COLLECT-ED LLC

May 22, 2024

Authorized Signature

Printed Name

Title

Date



PO Box 333
 Mustang, OK 73064
 Ph: (405) 830-2200 Fax: (405) 376-7237
 eFax: (501) 640-7815
 www.collect-ed.com

CONTACT FORM (UPDATE)

2025-2026

BEN# **140691**
 ENTITY: **JEFFERSON INDEP SCH DISTRICT**
 ADDRESS: **1600 Martin Luther King Drive**
Jefferson, TX 75657

FOR: ACCOUNTS PAYABLE CONTACT (FOR INVOICES)

NAME: Rebecca Pearl
 TITLE: Accounts Payable
 EMAIL: rrpearl@jeffersonisd.org
 PHONE: (903) 665-2461 ext 3505
 CELL PHONE: () _____

FOR: ERATE CONTACT (CALLS AND CORRESPONDENCE)

NAME: Jay Patrick
 TITLE: Director of Technology
 EMAIL: rijpatrick@jeffersonisd.org
 PHONE: (903) 665-2461 ext 3007
 CELL PHONE: () _____

ERATE AUTHORIZED SIGNATURE (ERATE APPLICATION CERTIFICATIONS)

Generally - (Superintendent, Assistant Superintendent, Director of Technology or Finance)
 REQUIRES USAC EPC website log-in and certification rights.

NAME: Jay Patrick
 TITLE: Director of Technology
 EMAIL: rijpatrick@jeffersonisd.org
 PHONE: (903) 665-2461 ext 3007
 CELL PHONE: () _____

RETURN CONTACT FORM WITH SERVICE AGREEMENT