

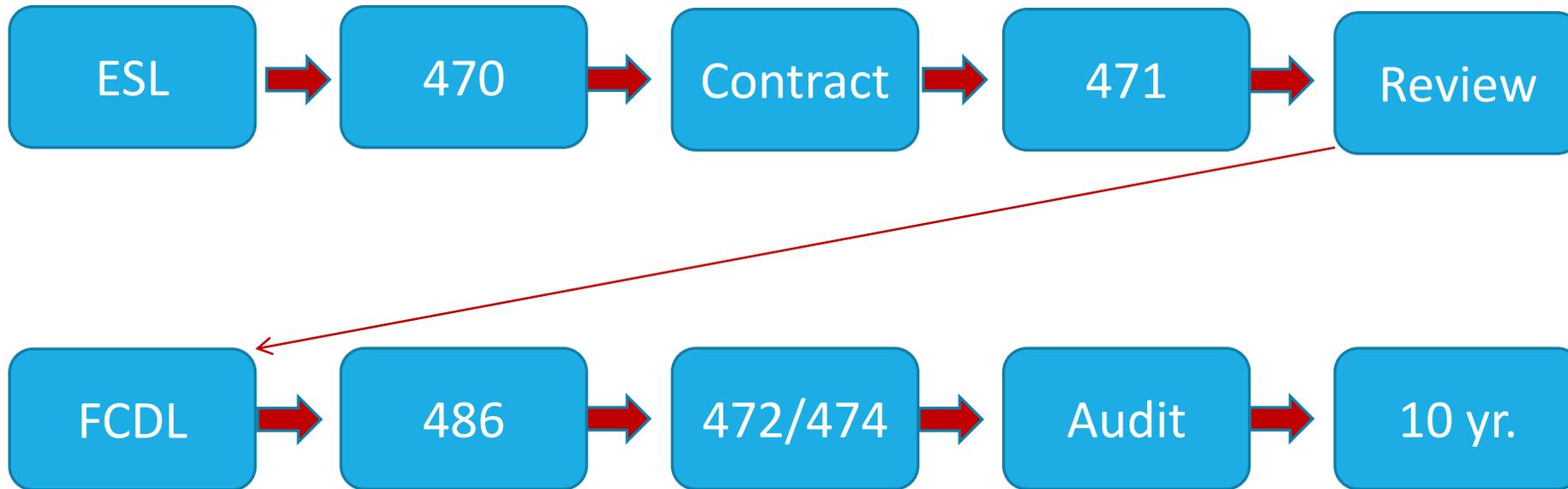
# E-Rate

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WHERE TO START?

# E-Rate Process

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# Find Yourself

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- On any given day, you will have three funding years to be worried about. So today you have:
  - Funding Year 2014 started July 1, 2014 and ended June 30, 2015
  - Funding your 2015 (current) started July 1, 2015 and will end in June 30, 2016
  - Funding year 2016 PROCESS starts now, and the funding year will end June 30, 2017
  - **E-Rate is an exercise in Project Management**

# Funding Year 2014

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- Services – Did you get the services you requested?
- 486 – 120 days after FCDL/services start (later of the two)
- BEAR/472 – have they been filed?
  - For reoccurring services Due date is October 28
  - For non-reoccurring services that must have been received by September 30<sup>th</sup>, the deadline is January 28<sup>th</sup> of the following year.
- Form 500 - have they been filed (turn in unused funds)?
- Was your district application denied?
  - Why?

# Where Am I for 2014

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Microsoft Excel  
Worksheet

# Denied in 2014? How do I find out?

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Microsoft Excel  
Worksheet

# Funding Year 2015

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- Funded (You have received the FCDL):
  - C1 Services – Are you receiving the services?
  - C2 Services – Have they been installed?
  - 486 – 120 days after FCDL/service start (later of the two)
  - Discount on bill – Have you verified your discount?
  - BEAR/472 – are you paying your bill in full?
- Not Funded Yet:
  - Have you responded to PIA questions?

# Well, where am I for 2015?

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Microsoft Excel  
Worksheet

# Funding Year 2016

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- Are you ready?
- You are about to seek an unknown amount of funding that is going to improve your teacher's ability to teach and you your student's ability to learn
- You are about to become a hero
- Know you are not alone

# 1<sup>st</sup> Step – Needs Assessment

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- Determine your discount rate
- Determine what your school needs
  - For Internet Access
  - For LAN
  - For Wi-Fi
  - For WAN connectivity

## 2<sup>nd</sup> Step – Can you afford it?

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- Get estimates from local service providers on the cost of what you think you would need.
- Examine your budget for check with your business manager to see if you can afford it.
- Check with your superintendent to see if these services, and these expenditures, are consistent with his or her goals.
- If not, revisit your needs and wants.

## 3<sup>rd</sup> Step – Now I know what I can do

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- Now that you know what the needs are,
  - and now that you know what your superintendent wants
  - and now that you know you can afford it
- You need to develop a plan of action
  - What comes first, upgrade WAN or upgrade LAN?
  - Seek advice from your fellow coordinators and how they handle it when they are faced with the same issues.
  - Don't think you have to do this by yourself.

# 4<sup>th</sup> Step – Procurement Process

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- You must have a contract from which to purchase anything.
- File a Form 470 which is the basic procurement process.
- After filing a Form 470 you must wait 28 days before you select your vendor and sign a contract – this includes the RFP as well.
- Evaluate your contract using Price as the Primary Factor.
- Sign contract by BOTH parties for the July 1 start date.
- Execute the contract
- You cannot allow vendors to assist you in anyway.

## 5<sup>th</sup> Step – Ask USAC for some Money

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- Once the Form 471 Window opens you will file a Form 471 which lists requests for each category of service.
  - You must be ready to show what services will go into what building.
  - You must have a quote or a contract to help you request the correct amount.
    - A Quote is better than a contract because quotes will have all costs; a contract does not always list all costs such as installation, surcharges, or fees.
- Give yourself plenty of time so if you make a mistake you'll you can simply cancel and do another Form 471.

# 6<sup>th</sup> Step – Wait

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- Wait for PIA to call for clarification
  - Answer all of their questions
  - Never argue with them
  - You may never hear from them at all
- Wait for SLD to issue you a Funding Commitment Decision Letter (FCDL)
- Simple as Jell-O

# You Cannot

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- Pay for services to any residential home, even the Super's
- Include ineligible services in your request unless you perform a cost allocation
- Except any type of free service from the vendor– Nothing is free!!!
- Except the gift from a vendor that exceeds \$20 per event or \$50 dollars per year

# You Cannot

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- Transfer equipment before three years
- Receive discounts for duplicative services
- Receive discounts for redundant services
- Receive discounts for backup/spare services

# If you want to Succeed

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- Then you must respond to PIA
- Then you must keep up with every little detail of every funding year
- Then you must attend training sessions
- Must be willing to phone a friend if you don't understand

# Questions?

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