

**Title of Session:** ISTE SIGTC: e-Rate

**Moderator:** Karen Connaghan

**Guest Speaker:** Dan Riordan

**Title of File:** 20050822sigtcerate

**Date:** August 22, 2005

Room: SIGTC Group Room

**KarenConna:** Tonight's session is on E-rate

**KarenConna:** Our expert is Dan Riordan

**KarenConna:** Dan is a member of ISTE's SIGTC and does a lot of work with e-Rate

**KarenConna:** Let's all welcome Dan

**KarenConna** claps for Dan

**DanR:** Hi! I'm Dan Riordan, and I've been involved with the E-Rate since the start.

**MichaelRu** joined the room.

**KarenConna** waves to MikeR

**DanR:** First, as a trainer, then as a tech coordinator, and now as a consultant.

**MichaelRu** waves back

**DanR:** I've done a lot of training on the subject of the E-Rate, but this is my first experience with this format, so forgive me if it's a bit "loose."

**KarenConna** smiles

**BillCon** joined the room.

**BillCon:** Hello all

**DanR:** I have two goals: 1) to show you some resources, including the E-Rate group here at Tapped In, and 2) to answer any questions you may have.

**KarenConna:** Sounds Great Dan!

**KarenConna:** I have a question for you

**DanR:** Go ahead

**KarenConna:** Are non-public schools eligible for e-rate funding?

**DanR:** Non-publics are eligible as long as: 1) they are non-profit and 2) their endowment is under \$50 million. So almost all are eligible.

**KarenConna:** Okay - thanks

**DanR:** If it's OK with everyone, let's go to the E-Rate Funding group room. It is one of the Featured Passageways from this room.

**KarenConna:** Scroll to the bottom of the SIGTC group page

**KarenConna:** you will see a link to the E-rate room.....OR

**KarenConna:** We can follow Dan.

**KarenConna:** Dan - go ahead and go to the room

**DanR** left the room.

**BillCon** left the room.

**MichaelRu** left the room.

**KarenConna:** Okay....Click on the tab on the left side that says online

**HankGst6** left the room.

**KarenConna:** find Dan's name....

**KarenConna:** click on his name.....

**KarenConna:** click only once

**KarenConna:** then click on the little door at the bottom of the window next to the refresh button

**KarenConna:** this will let you go wherever Dan is

**CarolR** left the room.

**KarenConna** left the room.

Room: E-Rate Group Room

**KarenConna** joined the room.

**DanR:** If you want to join the group, maybe Karen can explain that process (and what the advantage would be).

**KarenConna:** Great - everyone is here

**KarenConna:** I will give directions for that at the end of the session

**DanR:** OK, so the welcome section shows you a bit about the group, and you can see the Featured Passageways at the top. My office is there, though I don't think that will be of much interest, and the SIGTC group.

**DanR:** Scroll down and you'll see the Featured Items list. I'll try to keep some current info up there.

**SusanR** . o O ( and wonders what she has missed )

**DanR:** Susan, I'm just showing people around the room a little.

**SusanR:** thanks

**SusanR** is looking now

**DanR:** The first link I wanted to point out to everyone is the Proposed Eligible Services List. Right now, the FCC is taking comments from anyone who cares to make them about what should be on the ESL.

**KarenConna:** Is there a cut off date for the suggestions?

**DanR:** The rules say that the comments should only be about the list, and not about program rules, but it's a chance to make comments on anything.

**CarolR:** who wrote the summary list

**DanR:** The deadline for comments is Aug. 25

**DanR:** The summary was made by the SLD; that link goes to their site.

**KarenConna** . o O ( Thursday )

**KarenConna:** SLD?

**DanR:** SLD: Schools & Libraries Division, the part of USAC (Universal Services Administrative Company) that runs the E-Rate program.

**KarenConna:** thanks

**DanR:** They only gave 9 days for comment, which makes me think they don't really want any, but it's a chance to make sure your views are heard at the FCC.

**BillCon:** Dan, so the big question??? What will be the fate of USF and e-rate program for the near and long term future as congress and outside auditors look at mismanagement.

**DanR:** Near term, I think we're just looking at more audits and more regulation. The votes are not there in Congress to kill this thing.

**DanR:** But Rep. Barton, head of the House committee overseeing the E-Rate, has said he wants to put the program in the general treasury, then bleed it dry.

**DanR:** The first steps have been taken, but it will take a few years, and there will be opposition.

**KarenConna:** will anything replace it if that happens?

**DanR:** Not really, no. Once it's just a tax like any other tax, someone will try to cut it.

**KarenConna:** how long has e-rate been around?

**BillCon:** Where or who benefits from the funds as there collected?

**BillCon:** And held

**DanR:** The E-Rate was started in 1998.

**DanR:** It was created by the Telecommunications Act of 1996.

**KarenConna:** . o O ( that's fairly recent )

**CarolR:** What should we do now - I start back to school next week. first time filer

**DanR:** Yes, Universal Service has been around longer, but the Schools & Libraries piece was Al Gore's baby.

**DanR:** Excellent question. To do now:

**DanR:** First, make sure your tech plan is in order.

**DanR:** All the services you plan to request funding for must supported by your tech plan.

**DanR:** If they aren't, rewrite your tech plan now, and get the revisions approved by July 2006

**KarenConna:** is there a specific format you must follow for the tech plan

**DanR:** There are requirements for the E-Rate program, which you can find on the SLD Web site [www.sl.universalservice.org](http://www.sl.universalservice.org), but usually states put even more requirements on, so it's best to check with your state Dept. of Ed.

**DanR:** Most districts already have a tech plan to get EETT funding.

**DanR:** (don't ask me what EETT stands for; I only know you need a tech plan to get it.)

**DanR:** Assuming your tech plan is good, the first step in the application process is the Form 470.

**MichaelRu:** enhancing education through technology (I think)

**KarenConna** nods to Mike

**DanR:** The Form 470 is supposed to be an RFP; you list all the services you're likely to request funding for, and vendors bid on them.

**DanR:** But it doesn't work very well in bringing vendors to your door.

**DanR:** Still, you have to do it.

**DanR:** You can post a Form 470 any time. Go to [www.sl.universalservice.org](http://www.sl.universalservice.org) and click on "Apply Online."

**DanR:** It's a great form to start with, because if you make a mistake, you can just make a new 470.

**DanR:** You can file as many 470s as you like, though you really don't need more than one.

**KarenConna** . o O ( remember to press control before clicking on any of these links )

**DanR:** Technically, there is no deadline for filing the 470, but I recommend filing before November,

**KarenConna** . o O ( also remember to keep this window on top while viewing other pages )

**DanR:** When you go to "Apply Online" you'll see two options: "Form 470 Interview" and "Create Form 470." If it's your first time, I'd use the interview, but otherwise, I recommend the "Create Form" link, which shows you the form and you fill in the blanks.

**KarenConna:** what's the time frame for actually receiving the funds -- once all paperwork is done?

**DanR:** Right now we are beginning the application process for the 2006-2007 program year, which starts July 2006.

**DanR:** In theory, you should start seeing discounts on bills in July 2006, but right now I'm still working on getting funding for some of my clients for 2004-2005, and it may be a couple more months before they get it.

**DanR:** In fact, I'm fighting with a couple of service providers about funding from 2003-2004, but those are exceptional cases.

**CarolR:** Does you mean that they have already filled out any paper work, and are still "owed" the money from USF for 0405?

**SusanR** bows out graciously

**SusanR** left the room.

**BillCon:** Is this a result of investigation or just a very efficient management?

**DanR:** In general, yes, though there is still some paperwork that has not been filed, because we can't invoice the SLD for bills until the school has paid the vendor.

**DanR:** No investigations, just vendors who don't pay when they're supposed to and the SLD sitting on invoices.

**BillCon:** So organization pays bills in full and then is reimbursed from fund

**BillCon:** based upon vendors fulfilling paperwork!

**DanR:** Well, it was always supposed to work that vendors send discounted bills to schools (and billed the E-Rate for the discount directly), but it hasn't worked that way.

**KarenConna:** that sounds like a more efficient way Dan

**DanR:** First, I should say that E-Rate funding comes as a percentage of what you pay for telecommunications and Internet access (and if you have many low-income students, internal networking equipment)

**DanR:** Yes, but the vendors didn't want to do it. Finally, the FCC put its foot down, and most vendors are complying.

**BillCon:** Since it's a RFP can legal requirements and deadlines be added for vendor expedience?

**DanR:** However, some of my clients prefer reimbursement; if the board sees the telecomm bills going down, next year's telecomm budget gets cut, whereas the reimbursements can be spent anywhere.

**KarenConna:** o O ( good point )

**DanR:** The contract you sign with the vendor can have any conditions you like.

**DanR:** But many districts don't really treat the 470 like an RFP; they just post and then buy off a state master contract or buy what they've always bought.

**KarenConna:** How do the vendors know about the RFP? In other words...

**DanR:** In fact, many states post 470s when they do master contracts, so you may be able to use their master contracts without having to post a 470.

**KarenConna:** how does the 470 get publicized?

**KarenConna:** ah -- you've answered it

**DanR:** When you submit a 470, it goes into a database, and vendors can download the database.

**KarenConna:** do many of them actually do that?

**DanR:** some do, but in general the database is very poor, because applicants can put in anything they want, so it's very hard to search.

**BillCon:** So you might we might want to investigate state pricing (if any) for services or product?

**DanR:** Yes, I would certainly check with your state DOE about whether your state has E-Rate-compliant master contracts. Most that I've encountered do, but I know NJ does not.

**DanR:** By the way, if you want to see what other people are posting, just go to the "Apply Online" page <http://www.sl.universalservice.org/menu.asp> and click on the "Search Posted" button under Form 470.

**DanR:** You can put in your state, and see a list of all the 470s posted in your state.

**MichaelRu:** I was just looking at some of those - what a great resource to see what schools have don

**DanR:** You'll see that not too many people have posted yet. Look for more in Oct. and Nov., with stragglers waiting until Jan.

**KarenConna:** Regarding non public schools...

**DanR:** The process is the same for non-publics.

**KarenConna:** they would be applying for e-rate funds as individual schools since they are not districts ---so long as they have a tech plan, that would work too right?

**DanR:** Yes, it would work. The lack of a tech plan is often a stumbling block for private schools.

**DanR:** Without a tech plan, you can still get basic local and long distance phone service (including cell phones), but nothing else.

**DanR:** Any other questions on the 470? If not, I'll move on to the next form.

**KarenConna:** None here

**CarolR:** no

**DanR:** The Form 471 is the most challenging.

**DanR:** It is an exact description of the services you will be ordering. Who the vendor will be, how much you'll be paying, and what you are ordering.

**DanR:** If a contract is required, it must be signed before the 471 is filed.

**DanR:** For your first 471, I would definitely use the Interview.

**DanR:** And I should say that you should always file online, though you will have to send in a hard-copy certification (signature page) after you submit online.

**DanR:** The Form 471 has a deadline, which is generally in early Feb., but changes a bit every year.

**DanR:** That deadline is a drop-deadline. It doesn't matter if you have an accident in a blizzard on the way to the post office and go into intensive care; you miss the deadline, your district gets no funding for a year.

**DanR:** So do the form early.



**DanR:** You can't file now, but the "window" will probably open in November.

**DanR:** The "window" is a time period during which you can file. It used to be the "80-day window,

**DanR:** but they shortened it last year.

**CarolR:** Is there a stipulation that you file 470 wait 29 days and then sign the contract?

**DanR:** Right, sorry I didn't mention it.

**DanR:** After you file the 470, you must wait 28 days to pick a vendor.

**KarenConna:** Does the e-rate room have a "timeline" document posted to help those new to e-rate meet deadlines?

**CarolR:** YEAH!!! (I hope)

**DanR:** Which means you must wait 28 days before you file the Form 470

**CarolR:** form 471?

**DanR:** 471, right

**DanR:** You'll find a timeline in the E-RateOverview.pdf in the Files section

**KarenConna:** Super!

**DanR:** That document describes the process in general, and it's a good place to start.

**KarenConna:** You've put together some great resources for us

**DanR:** Thanks.

**DanR:** There are more files like that one at [www.on-tech.com/presentations](http://www.on-tech.com/presentations)

**DanR:** I didn't want to put too many links to my own site in the room for fear of making it seem like an ad.

**DanR:** Also, you may want to check out [www.on-tech.com/webinars](http://www.on-tech.com/webinars).

**KarenConna:** Dan has also created a discussion group - so we can post things there and get ideas and help from each other as well as from Dan

**MichaelRu:** Thanks for some great info and a really nice room at tapped in (I already joined the group) - I must take my leave - thanks again.

**DanR:** I'm giving a series of Webinars on the E-Rate; they're free.

**KarenConna** waves to Mike

**DanR:** Thanks for coming, Mike.

**KarenConna:** Dan, you should post the dates of the free webinar in the discussion group....

**KarenConna:** anyone who is subscribed to your room will receive those

**DanR:** good idea

**DanR:** Unfortunately, the "Overview" Webinar has already run, though I'm thinking about rerunning it in Oct. or Nov.

**KarenConna:** Our time is just about up

**KarenConna:** If there are no other questions, I'll tell how to join the e-rate room and the sigtc room

**CarolR:** No more right now - Thanks Dan

**KarenConna** claps for Dan

**DanR:** Just a quick note to Carol; if you are picking up the process from someone else, you may have some forms for 05-06 to do.

**DanR:** Thank you very much, Karen. You should all feel free to email me with questions any time.

**KarenConna:** I learned quite a bit tonight -- I'm not very familiar with e-rate

**CarolR:** We haven't filed in 2-3 years. So I'll be starting new

**KarenConna:** To join the ERate room....

**KarenConna:** Find the search tab at the top of the E-Rate room window (not this chat window) and click on it.....

**KarenConna:** Find the Groups Link in the Purple bar near the top of the information page. In the search field, type E-Rate Funding and click Find It

**KarenConna:** In the list that is returned, click on the E-Rate funding group - this will take you to the information page

**KarenConna:** look at the top of that page and you'll see a link that says join this room

**BillCon:** Thanks Dan

**KarenConna:** click that link

**KarenConna:** To join SIGTC repeat the process again....

**KarenConna:** click the search tab

**KarenConna:** Click on Groups in the purple bar

**KarenConna:** Type in SIGTC

**KarenConna:** Select SIGTC from the list and click on it

**DanR:** You're welcome, Bill

**KarenConna:** on the group page, click the link that says join SIGTC

**KarenConna:** Carol -did you find the e-rate funding group?

**CarolR:** Yes and joined the group Now on to sigtc

**KarenConna:** Great

**CarolR:** This will be so helpful - I won't feel alone when working on E-Rate

**CarolR:** Thanks Karen

**KarenConna:** Welcome

**DanR:** Any info you need, let me know.

**KarenConna:** thanks again Dan

**KarenConna:** I officially close this session

**DanR:** Thank you, Karen

**KarenConna:** Goodnight all