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EDROOM ONLINE DISCUSSION GROUP

Discussion Name: eSchool News E-rate
Date Printed: April 17, 2008

Topic 1

Read First

In this first phase of the discussion, we'll explore your management of the E-rate process.

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- Question 1 focuses on the parts of the process that you manage well.
- Question 2 focuses on the parts of the process that you don't managed well.

You can answer both questions during one longer session or visit the EDRoom on a couple of occasions. Please complete your answers to all these questions by Tuesday, 7:00 PM Eastern time.

If possible, after completing your answers, return to the EDRoom before Tuesday at 7:00 PM to read the comments of other participants and to write your reactions to them.

- To read a question, click the tab with its question number above.
*- When you've answered all the questions, click the **Follow-up** tab above.*

Question 1

What parts of the E-rate process do you manage exceptionally well? Please indicate from the following list, or identify other parts of the process that you manage well:

Technology planning
Form 470 / Procurement process
Service / Product eligibility
Form 471 / Applying for discounts
Application review
Form 486 / Receiving services
Payment paperwork (BEAR/SPI)
Service substitutions and deadline extensions
Document retention

Audit / Review process
Appeals
Other

- How do you manage these parts of the process?

- For each part of the E-rate process you manage well, what information would you share with other E-rate applicants to help them with this part of the process?

When you're ready to answer the questions:
*1. Click the **Reply** button above.*
2. Type your response using the built-in word processing tool.
*3. Click the **Save** button (at the top right of the word processing tool) to post your response.*

Make sure that you see your response posted!

LaurieW Monday, April 07, 2008 8:18:34 AM

I manage the Form 471 exceptionally well because I begin with the previous several year's applications and project changes from this base. It is very similar to budget preparation except that we do not initially look at the economic forcast for our County.

The Form 486 is simple to prepare and is therefore managed exceptionally well.

Document retention has been managed via the introduction of a scanner and database system which we use to prepare bill payment approvals as well as bill/form filing. I checked with the SLD to make sure that electronic copies of bills and forms would be acceptable in the case of an audit or a review and was assured that this was indeed the case.

DennisB Monday, April 07, 2008 10:44:39 AM

Technology Planning is a strong point for me, as well as application review. We are a new charter school so learning the process is new to us. Hopefully we can get the ERATE funding we need, even thought the deadlines were'nt met.

LaurieW Tuesday, April 08, 2008 10:17:51 AM

I find that the most difficult part of Erate is meeting the deadlines and juggling 3 funding years at a time. I have notes all over my office with deadlines, funding year dates (including a translation to calendar year, fiscal year and erate year). Meeting the deadlines are difficult because I rely on responses from many different people during the preparation of the 471. I tried having an all day info meeting this year, but only 2 people showed up.

Jay Sunday, April 13, 2008 10:41:13 AM

Dennis, we're hoping that others can learn from your success at Technology Plannning and Application review.

- Please explain how you manage these parts of the process?

- What topis/suggestions would you share with other E-rate applicants to help them with these parts of the process?

CherylS Monday, April 07, 2008 3:57:15 PM

We have a district technology committee made up of district administrators, district technology personnel, school administrators, school techs, and teachers. We look at the district technology plan annually and update our goals and strategies as appropriate. We submit an update annually to Florida DOE and the Florida E-rate Office. Several subcommittees thrive under this committee's umbrella: Emerging Technologies, Pinnacle Gradebook Management, Distance Learning, E-mail, Technology Standards, Network (Web etc.), Technology Inservice, and one or two others that I can't remember right now. These subcommittees report back to the main committee after any meeting and make recommendations relevant to their subject area.

I am in the Media & Instructional Technology Department. The Information Systems, Information Technology, and Instructional Technology Departments are all under the same Assistant Superintendant. We meet as a group twice per month to update each other and work together when appropriate on many of our initiatives.

I have been applying for and receiving e-rate funds since the inception and am comfortable with filing a 470 as needed for a specific purpose. I work closely with the Director of Information Technology who is over our WAN and all of the school networks and wiring closets. I also monitor our free/reduced lunch carefully and give him a heads-up on any schools that look like they will be 90% schools. Then we determine if their wiring closets need updating. We also carefully track the 2 in 5 rule. We have been able to keep our closets in decent condition this way. This year we had 13 90% schools but chose not to apply for any updates.

We download the new Eligible Services List each year and I keep both an electronic copy and a hard copy on file. We read through the list to determine the changes. We also attend an annual meeting provided by our State of Florida E-rate office that makes sure we note changes in eligible services.

When filing the 470 I try to make sure that people understand exactly what we are looking for - we tried filing RFP twice - it was an unpleasant experience the first time but went very well the second time -- you must file the 470 WELL in advance of the November dates when filing an RFP to give yourself plenty of time to go through all the required dance steps. Usually we do not do an RFP - we provide the contact information (e-mail and phone) so that we can provide the detailed list of exactly what we want.

Our school district has a very high mobility rate (changes as much as 100 students per day) so I pick one day in October and lock in to that day. I request the food service report for that day - they print out for me from their SNAPS system and I prepare the spreadsheet. We also open 1 - 4 schools per year and I always need to remember to get entity numbers for them ahead of time. I put in for the new schools at the lowest free/reduced lunch rate so that I won't have audit problems (and have still managed to have audit problems - where I then provided the rates of the schools that we took the students from for the new schools and thus got higher rates than I had applied for).

I ALWAYS get audited because our free/reduced rates are as volotile as our mobility rate. I have always been able to prove that the rates are as I claim but have to get the Director of Food Service and sometimes our Superintendent involved.

The first 9 years I had no help in doing e-rate but I finally received an assistant last spring. Thank goodness. We were notified of the BIG audit in February - we had two weeks to gather quite a bit of information to send off to Ernst & Young. They then arrived two weeks later. They said they would be here 5 weeks - they were here 5 weeks and were still asking questions at 4:30 on the very last day - they called three times the following week for more information and again the week after for more. The findings were what they (Ernst & Young) called insignificant, although we may owe the SLC a little bit of money - they said that they doubted the SLC would ask for the small amount. Believe me I thought that we kept everything we were supposed to but they wanted way more than we have been told to keep on file. They also went into old records that they weren't auditing just to make sure we were really maintaining as required.

When our FCDL's come in I record on the front just what they are for and how much is funded - I record on my calendar a date that I must file the 486 by (within the first month). I keep a spreadsheet that has my 471, FRN, 471 name, FRN funding amounts, funded y/n, 472 first amt, 472 2nd amt. this helps me track everything.

For the 472 every couple of months I update the spreadsheet that I maintain for each FRN with the amounts of the bills. I already have the discount rate calculated in to the total that I can apply for. I apply twice per year. I include a copy of my spreadsheet to my vendors and generally give them a call shortly after I file the 472 online just for a heads-up. One of my vendors has no other school district but us and we have to always guide her through the e-rate process.

We have had to file several appeals - have always consulted our Florida DOE e-rate advisors first and they help us put correct info into our appeal. We have won all appeals.

Have had to file form 500 twice. No problems.

After the audit we finished last month - KEEP EVERYTHING. They will want to see it. Be super organized!! I cannot say this enough. Have a written step - by - step process of what you do in e-rate (even though you are following all e-rate / district / state guidelines --- they still want something just for you.

KathleenT Monday, April 07, 2008 10:52:29 PM

I don't feel that I manage any part of the process exceptionally well. I somehow have managed to muddle through enough to get 470 and 471 filed. I am the third person in as many years at my school to be in charge of the E-rate process. I filed years ago at another school but we didn't receive enough money to make it worthwhile. At my current school, we have decided that filing is worth it. However the amount of time and work it takes is formidable for someone who has many other responsibilities. I have a file with all the paperwork we have sent or received for the past several years. I am honestly not sure about what I need to keep. From reading the other posts, it would seem that many other people in charge of this process have a much better handle on it than I do. Most of the time, I'm not even certain what the terminology used in the E-rate process means. Since I'm the only one in my building who has anything to do with it, I have to learn.

I came back to this one since I just got a call that there were problems with my 471s. Somehow two FRNs were attached to one of my 471s that were incorrect. One was a duplicate, the other was a mystery to me. I had to cancel them, because I had no idea what I had done. I kept every piece of paper relating to the 471s, but could not find anything relating to the mystery FRN. Since I'm the one who filed it, I must have made a mistake, but it is very frustrating not understanding the process. That said, the woman who called me was very patient and helpful, but she couldn't tell me where to find the information I was looking for in my 471. I feel like I'm at the bottom of the barrel as far as competency of people in charge of filing for E-rate.

JimC Tuesday, April 08, 2008 1:15:17 PM
Technology planning may be the easiest to manage because our state department of education has online technology plan submission that includes all the elements required by the E-rate process. If all parts of the plan are completed, in theory the technology plan will satisfy E-rate rule requirements

KathrynW Tuesday, April 08, 2008 3:21:14 PM
What parts do we manage well

Form 470/Procurement process-As long as the procurement folks listen to us and understand that the 28 posting period CANNOT CANNOT be shortened, the procurement process goes fairly smoothly.

Service/Product eligibility-We always try to match the service/product we are seeking as exact as possible to the Eligible Services List. This is an area where "thinking outside the box" should NEVER be done; it means you will receive many questions during PIA review, could be denied and then have to file an appeal that won't be granted.

Form 471/Applying for discounts-Don't even attempt to file this until the signed contract is in your hand; be sure ALL the documents (contracts, lunch numbers, LOAs, etc.) are together in the same file. Before submitting on line, we always do a "practice" copy.

Application review-If you can't give PIA what they have asked for right away, see how much time they will give you; don't wait until the day it is due! If you have a consortium, make sure the reviewer knows from the beginning that you might have to obtain information from other folks. Don't ever blame the reviewer when you get requests for the same info over and over, just fax or e-mail it to them (pretend to smile when talking to them).

Form 486/Receiving services-Filing the document itself is not a problem, it's the SLD follow-up.

Payment paperwork(BEAR/SPI)-As a state network, we've filed both BEARs and SPIs; filing SPIs online is very easy and the service providers we deal with regarding BEARs are very good about catching any errors we may have made.

Service substitutions and deadline extensions-We have only filed for deadline extensions. This is an area where you need to make sure your requests is within the instructions on the SLD web site (no thinking "outside the box"!).

Document retention-Save everything and keep it in a file where, heaven forbid, if something happens to you, it can be located by someone else. Print out e-mails, keep proof that faxes were received, keep proof that documents were received by the SLD (send DHL, FedEx, UPS, USPS certified mail return receipt requested).

Appeals-Consult an attorney, it is well worth the time and money; even if they don't write the appeal, have them review it before it goes out the door.

BonnieT Thursday, April 10, 2008 8:26:10 AM

What do we manage well?

Now that I understand how far out in advance the tech plan is needed. I do ok on that thanks to TechAtlas at Web Junction and the state library.

The 486 form is alright I can't think of anything that would help anyone.

Document retention -- Keep everything -- forever.

The list of things we struggle with will be MUCH longer.

Bonnie

Jay Sunday, April 13, 2008 10:50:05 AM

Bonnie, for those who are unfamiliar with TechAtlas, can you please briefly explain what it is and what it provides.

BonnieT Sunday, April 13, 2008 9:19:58 PM

TechAtlas is a tool available on the Webjunction website that helps you step thru the technology planning process. You enter such things as your mission statement, your inventory, your budget etc and it puts together a nice plan for you. More information is available at http://www.webjunction.org/do/Navigation?category=13408

Bonnie

Question 2

What parts of the E-rate process do you NOT manage well or need more assistance with? Please indicate from the following list, or identify other parts of the process that you find challenging:

Technology planning
Form 470 / Procurement process
Service / Product eligibility
Form 471 / Applying for discounts
Application review
Form 486 / Receiving services
Payment paperwork (BEAR/SPI)
Service substitutions and deadline extensions
Document retention
Audit / Review process
Appeals
Other

What additional informational resources would you like from the FCC, USAC, or SLD to improve your ability to administer or manage these parts of the E-rate process for your organization?

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LaurieW Monday, April 07, 2008 8:27:59 AM

The technology planning (and the preparation of the tech plan) has been problematic because our County, State and the SLD each have different requirements, forms and approval proccesses.

We also have a problem with getting State third-party verification of eleigible entities as required during the review process. We have an over-loaded State Erate coordinator who has very little time to devote to phone calls or email consultations.

I rely heavily on our Erate consultant for the management of appeals, service subsitiutions and deadline extensions becuase I do not have time to prepare this documentation.

I would like the SLD to combine repetitive requirements during the review (such as signed enrollment and free and reduced lunch documentation) as part of the actual application. If we are always asked for the same documentation, why wait for the review to supply them?

Jay Sunday, April 13, 2008 10:52:05 AM
Laurie, are there any additional informational resources would you like from the FCC, USAC, or SLD to improve your ability to administer or manage these parts of the E-rate process for your organization?

CherylS Monday, April 07, 2008 4:01:15 PM
With the help of DOE e-rate consultants and my assistant - we are doing fine.

The first five years I did not keep enough records -- thank goodness we did not get audited during that time.

KathleenT Monday, April 07, 2008 10:56:30 PM
I suspect that I answered this one in my reply to the first question. Technology planning is a definite weakness. In addition, I simply don't understand the process at all including terminology used in the filing process. Fortunately, I haven't experienced an audit and I've never asked for an extension. I just assumed that if I didn't get something completed on time, I was out of luck.

Of course, we are a very small school with very simple requests.

Jay Sunday, April 13, 2008 10:53:26 AM
Kathleen, are there any additional informational resources would you like from the FCC, USAC, or SLD to help you with the challenges you mentioned?

KathleenT Sunday, April 13, 2008 1:34:18 PM
Very simple directions in plain English and a glossary of definition of terms also in plain English.

A timeline with detailed explanations.

The above would help. I'm not even certain of all of my questions. Help, preferably interactive, while one is in the process of completing an online form would be useful.

JimC Tuesday, April 08, 2008 1:33:12 PM
Document retention can be a real problem. Last year the SLD made available on their website "Guide to

E-Rate Binder Table of Contents" which lists the documents that applicant's may need to keep. It lists 66 documents.

While every applicant would not need to keep every document listed, it would not be unreasonable to expect even small applicants to need to keep over 30 different types of documents on file.

The table of content does state that "This guide is not mandatory" but that "Retaining this type of

information will be very helpful if USAC requests this information in the future."

If audited, applicants might be surprised at being asked for documentation they were not aware of a need to keep, example: "Filtering Documentation (purchase, installation, use)"

Jay Sunday, April 13, 2008 10:57:27 AM
Jim, in response to Querstion 1, LaurieW mentioned use of scanning and database technologies to manage document retention. Would an informational resource SLD be helpful to your organization?

JimC Wednesday, April 16, 2008 4:24:49 PM

You asked "Would an informational resource SLD be helpful to your organization?"

Not quite sure what that means, but any help or resources to help make documentation retention would be most appreciated and welcome.

KathrynW Tuesday, April 08, 2008 3:42:33 PM

This is going to be a very general statement on not managing E-Rate well:

It is NOT possible to manage this program well when rules get changed AFTER the fact. The audits that the FCC and SLD are now conducting, they are imposing program rules that came into being after the Program Year that they are reviewing. Nobody can create documents, records if they weren't made aware that they needed them. An example of this is the SLD's asking about the "creation dates" of technology plans; nobody was aware until recently that your tech plan had to be "created" before you could file your Form 470. Going forward, fine, we'll all know we'll need another piece of paper in our file to document when the tech plan was "born", but we can't do this going backward.

The FCC auditors are also imposing FCC audit standards that E-Rate applicants haven't been made aware of by the SLD. It's like the SLD and FCC want to purposely ding applicants. I realize that these audits are supposed to make sure that applicants aren't involved in Waste, Fraud and Abuse, but the vast majority of E-Rate applications come from schools that are required by their state law to adhere to some minimum standards and public libraries are part of local government or have a public board overseeing their existence (again, they must adhere to some minimum standards required by law) so why are they being treated like they have done something wrong?

Wouldn't it be great to see this level of review applied to military contractors?

Okay, I'll get off the soap box.

JimC Tuesday, April 08, 2008 5:31:01 PM

I concur with KathrynW. I have accused the SLD (and auditors) of making up rules as they go along. Their response was that, no...."they clarify the rules from time to time."

The problem comes when they try to make the clarified rules retroactive (in our country we generally don't allow ex post facto laws). When they do, applicants have to go back to old training slides or form instructions and try to make the case that they were acting in good faith with the best information they had at the time when they filed their applications.

CherylS Friday, April 11, 2008 3:24:58 PM

Boy, do I agree with Kathryn - we actually lived this experience on an electronic audit - thankfully I had a copy of the older version of the submission forms -- the auditor was trying to put my info into a new form when I filed on an old form (the one correct for the year I filed) -- I was able to send a pdf of the old form to the auditor and show where he was incorrect (they don't like to be told they are wrong) but that was not enough - we had to get our state e-rate lady involved and the overall head of SLC to get this person off our backs

DennisB Wednesday, April 09, 2008 10:03:43 AM

The timeline. We are a new charter school and did not know the deadline dates. We do, however know for next year

BonnieT Thursday, April 10, 2008 8:57:51 AM

Not manage well. Almost everything

Technology planning -- the plan itself is fine as metioned under question 1. However having to continually work so far in advance can be problematic.

Form 470 -- we are in a rural area -- we have one choice of provider -- regardless the 470 makes life difficult for us. Then we have to keep in our files competitive bids and why we chose the one we went with. What competitive bids -- if we want Internet we have one choice.

Service/Product eligibility -- The list changes all the time and is pages and pages long -- very difficult to interpret.

Form 471 -- The online interview application is a joke. Two years in a row I have started it and not been able to complete it due to a glitch in the program. When I call I get an oh well shrug. I do fill out the on-line form but the interview one I have to leave hanging. Then there isn't any way that I have found to delete an application once you have started so when I go in to check status the interview one is hanging there taunting me as incomplete.

Application Review -- we have only had to supply additional information once so far. I got an e-mail to which I responded, a phone call to which I responded and another e-mail to which I responded. They all asked the same thing. When I questioned why I was being asked the same thing over and over the reply was that they just wanted to see if they would get the same answer. Grrr -- you might consider trusting us. Last year when I checked the 471 status it seemed to move right along thru the process. This year it has sat at certified in window for 3 months.

Form 486 -- the E-rate form is fairly straight forward -- the forms from the suppliers on the other hand.... We fought with MCI for months and months to get our discounts.

Bear -- we get discounts so I guess we do alright with the Bear

Service Substitutions -- never had to do this one thank God

Document retention -- Space can be an issue. Because we had a multi-year contract we were told that we had to keep everything for 5 years before the start of that contract.. Well guess what -- that is back to the begining. Next year I'm going to need a new bookcase tho where I will put it I haven't a clue.

Audit -- none so far -- knock wood

Appeals -- My predecessor was filing at the deadline and then the system went down. When he checked again a week later the application was in but not certified. After he certified the application it became certified out of window and was denied. He appealed but was turned down. He was forced into retirement because of this very expensive error. Is it any wonder I get extremely anxious just talking about E-rate?

Other -- I had to laugh at the question that asked about average time spent per week on e-rate. Some times of the year it barely crosses my mind -- other times -- it is all I do -- I even dream about it. How do you average everything and nothing. I guess if I could ask for things it would be on-line tools that work, (when are you updating you Adobe Acrobat?) and better communication on the progress of individual applications.

Jay Sunday, April 13, 2008 11:09:54 AM
Bonnie, how far in advance do you have to start the technology plan? What would be a reasonable timeframe to you?

BonnieT Sunday, April 13, 2008 9:27:12 PM
In July/August I will start thinking about the 470 for Year 12 2009-2010. The technology plan is suppose to be in place before that process begins so in mid 2008 (before our budget of 2008-2009 is even in place) I'm suppose to be aware of what is going to be needed by 2010. It would be alot easier if the technology plan could be in place by the beginning of the applicable E-rate year. Now since our technology plan can over cover 3 years. Things are being decided and set in stone thru E-rate two years out. A plan is a plan -- some succeed and some fail but with e-rate there is no plan failure allowed.

Follow-up

After you've answered Questions 1 and 2, please check back sometime before 7:00 PM Eastern time on Tuesday, April 8. (Please adjust for your time zone.)

Review the responses of the other participants and spend some time commenting on their responses--as if you were having a conversation with the group. You're welcome to come back as often as you'd like to see how the discussion is progressing and to add your thoughts.

As of 7 PM Eastern on Tuesday, April 8, I'll post Topic 2 with new questions for you to answer. You'll have until Thursday, April 10 at midnight Eastern to respond to these new questions and spend some time interacting with the group.

Thanks for your participation thus far!

Topic 2

Read First

In this phase of the discussion, we'll explore E-rate rules.

> Question 1 focuses on ideas and recommendations regarding rule changes.
> Question 2 focuses on satisfaction with the rules about which types of products and services are eligible for E-rate.
> Question 3 focuses on any impact of the eligibility rules on the outcomes described in your organization's technology plan.
> Question 4 focuses on your experience with and recommendations regarding the Internal Connections "2-in-5 Rule."

You can answer all four questions during one longer session or visit the EDRoom on several occasions. Please complete your answers to all four questions by Thursday, 12 midnight Eastern time.

If possible, after completing your answers, return to the EDRoom before Thursday, 12 midnight to read the comments of other participants and write your reactions to them.

- To read a question, click the tab with its question number above.
*- When you've answered all the questions, click the **Follow-up** tab above.*

Question 1

What rule changes to the E-rate process would you like to see that would make the program easier for applicants--but would still ensure that the process guards against waste, fraud, and abuse?

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LaurieW Wednesday, April 09, 2008 8:58:40 AM

I would like to see the deadlines for the 471 moved closer to the start of the fiscal year in which the products will be purchased. Our vendors have a difficult time making bids so far in advance, and our larger vendors have problems getting new contracts prepared in time for us. The good news is that we now only have to have 1 signature by the close date. Our common carrier has all kinds of legislative hoops to jump through before they can counter-sign contracts.

I would like to go back to the original concept of a straight discount for schools. It would eliminate the SLD and all of the rules and all of the paperwork. I met one of the original developers of the program and it is his greatest regret that this seemingly simple discount program has become such a behemoth of government.

The eligible services list is unduly complicated. There are components within eligible services which must be cost-calculated out. The 30% rule is arbitrary and difficult to deal with.

This isn't exactly a rule change, but I would like to see more technical or school people join the ranks of the reviewers. I seem to spend a lot of time explaining how technology works or what the various components of a phone bill means or the legislative process for our PSC and tarriff rules to reviewers who seem to be in place with the sole purpose of getting applicants to concede money.

There are too many forms, too many signatures and too many rules.

DennisB Wednesday, April 09, 2008 10:04:40 AM

Deadlines for charter schools. We are new charter school and we were never informed of the closing dates. I am still awaiting our rejection letter so I can file an appeal

> **Jay** Sunday, April 13, 2008 11:12:33 AM
>
> Dennis, does this problem call for a rules change -- or better communication from SLD?

KathleenT Thursday, April 10, 2008 10:32:59 AM

I agree with LaurieW about the dates and paperwork. We had a great deal of difficulty adding services because we were in the middle of a contract that we previously had not realized was an eligible service. The deadlines really do not coincide with when schools need to negotiate contracts. Our other multi-year contract was up at a time when we couldn't apply. Very difficult to deal with! We ended up having to be off contract for several months while we applied and accepted bids from other vendors, which cost us significantly.

The amount of paperwork and the terminology with which the average teacher, technology or otherwise is unfamiliar, makes the simple job of applying for E-rate funds cost a lot in man-hours. I suspect that if it were better or more easily understood, more schools would apply for more funds. The cumbersomeness of the process must certainly leave some students out by virtue of the fact that their administration just doesn't have the time and money to complete the process.

KathrynW Friday, April 11, 2008 1:17:24 PM

I think the SLD should consider whether a Form 470 is needed for certain services, such as telephone service (local and long distance landline service). The vast majority of applicants do not have a choice as to who they will buy local telephone service from and, in many places, the choice of long distance service is also limited.

If the applicant is going to use a contract established by another entity (municipal, county, state, federal), I think the SLD should consider that they don't have to file a Form 470. I realize that the posting of the Form 470 for purposes of procurement is one of the "must dos" of the E-Rate program, but the world of 1996 is not the world of 2008 in terms of multiple telecom service providers.

CherylS Friday, April 11, 2008 2:52:32 PM
I am concerned that not all PIA auditors seem to be trained the same -- I always have new schools and usually must have a letter from our Superintendent verifying that they are schools as identified by blah,blah,blah and so forth.

We had one auditor that would not accept that letter as verification -- I had to dig through school board minutes and supply minutes that gave the administrators permission to spend money in the school's name.

Some of these auditors accept straight-forward proof and others just keep digging and digging and digging - when e-rate is only one of your hats that takes up TOO MUCH of your time.

BonnieT Monday, April 14, 2008 11:19:16 AM
I guess I didn't answer because I had no opinion. I agree with Laurie W and having the e-rate year closer to the fiscal year (for us Oct 1) would put the filing deadlines more in line with our budget deadlines.

JimC Monday, April 14, 2008 2:38:40 PM
Many smaller schools apply only for discounts on plain old telephone service (POTS). Without thinking through the implications of the SLD needing to estimate total requests received through the application process, it sure would be nice if smaller applicants could be pre-approved up to some funding amount and just send a copy of their phone bills to the SLD for reimbursment.

Question 2

Are you satisfied with the types of products and services that are eligible for E-rate? If not, what changes would you make to the types that are eligible?

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LaurieW Wednesday, April 09, 2008 9:05:14 AM

I would like to see VOIP and video conferencing more generally eligible. The difference between a router a PBX and a VOIP controller is beyond me. We are not encouraged to try leading edge technologies because they have not made appearances on the eligible services list.

I would like to see PCs, modems, cellphones and telephones become eligible. We don't get funding below 80% as it is, so why not broaden the allowable equipment?

DennisB Wednesday, April 09, 2008 10:05:17 AM

I am very satifsied with the choices and the availblity that we have, just as long as we can get it

KathrynW Thursday, April 10, 2008 10:00:00 AM

LaurieW makes a very good point about the VOIP technology; the FCC seems VERY slow in deciding that "new" technology can be E-Rate eligible.

KathleenT Thursday, April 10, 2008 10:36:48 AM

Once again, I agree with LaurieW. New technologies taking so long to appear on the allowable services list, in effect, separates the "haves" from the "have nots". Just because schools can get E-rate funds to help finance basic technology, doesn't mean that technology is standing still.

Jay Sunday, April 13, 2008 11:17:35 AM

Kathleen, which specific new technologies would you like to see on the allowable services list?

KathleenT Tuesday, April 15, 2008 11:31:10 PM

video conferencing, streaming video, harware/software that includes filtering (annual subscriptions to filtered browsers, online educational communication tools such as wikis and blogs, teacher websites. Just connections to access the internet is really only the tip of the iceberg these days.

CherylS Friday, April 11, 2008 2:55:54 PM

I agree with Laurie W also, they are slow recognizing certain modern technologies - which leaves us to wait or go forward completely on our own money

Jay Sunday, April 13, 2008 11:18:35 AM

Cheryl, which specific new technologies would you like to see on the allowable services list?

BonnieT Monday, April 14, 2008 11:16:13 AM

I agree with Laurie W.

Telephones for sure.

Not nimble concerning new technology

JimC Monday, April 14, 2008 2:43:10 PM
Basically, I'm satisfied with the Eligible Services List and feel making end user hardware ineligible.

Since content filtering is required in order to be eligible for discounts on Internet Access services, it would be nice if content filtering services, hardware or software were eligible.

I'd also like to see scheduling services become E-rate eligible for distance learning/video conferencing applications.

Question 3

Are the outcomes described in your organization's technology plan in any way affected by the products or services that are eligible and ineligible for E-rate discounts? If so, how?

When you're ready to answer the questions:
*1. Click the **Reply** button above.*
2. Type your response using the built-in word processing tool.
*3. Click the **Save** button (at the top right of the word processing tool) to post your response.*

Make sure that you see your response posted!

LaurieW Wednesday, April 09, 2008 9:09:21 AM
I do not think that E-rate has a large impact on the contents of our technology plan. We have been seriously preparing tech plans since the 70's and will continue to do so with or without E-rate funding considerations. The SLD may have the notion that the whole world revoloves around its program, but our school system will continue to move forward with technology in any case.

DennisB Wednesday, April 09, 2008 10:06:19 AM
Thats a big YES !! We need the ERATE discounts to keep our network up and running. Especially the internet access for the kids. We do not have the backing that the public school do.

Jay Sunday, April 13, 2008 11:22:41 AM
Dennis, can you provide examples of how the eligibility or ineligibility of types services impacted your technology plan and the outcomes decribed in it?

KathrynW Thursday, April 10, 2008 9:57:19 AM
This is where service providers can have **too** much impact.

Typical situation: Service provider representative, literature, e-mail gets to a superintendent, school board member, school president touting how E-Rate can pay for the wonderful, fantastic, cutting-edge service/product. They go to the E-Rate person in their school/district and start pushing for this service/product. So the tech plan gets updated to include this wonderful, fantastic, cutting-edge service/product, whether or not it fits in with the long-term needs/plans of the school district/school. Oh, and whether or not it really is E-Rate eligible.

KathleenT Thursday, April 10, 2008 10:40:36 AM

At this point our technology plan is independent of E-rate. We would have to take a serious look at it if we lost all E-rate funding. Somehow we would need to come up with alternative funding sources or revise our technology plan.

BonnieT Friday, April 11, 2008 12:45:07 PM

The technology plan is absolutely affected by E-rate. For one thing we have to work so far out in advance to make sure our plan is approved before we begin our application for the next e-rate year. Then we are locked in and can't make changes that technology may encourage us to make.

Jay Sunday, April 13, 2008 11:24:58 AM

Bonnie, can you provide examples of how the eligibility or ineligibility of types services impacted your technology plan and the outcomes decribed in it?

BonnieT Sunday, April 13, 2008 9:33:09 PM

It is late and I put my back out today, so I'm not thinking to clearly. I guess the only example I can think of is that in our tech plan we wanted to explore additional computers for patrons. Wi-Fi technology made a leap forward and some money came available and we were able to put wi-fi in all five technology branches. It was in our tech plan as a dream, e-rate was not responsive enough (nimble enough) to allow us to implement this with partial federal funding. Wi-Fi is in, it works, and our Internet useage has doubled.

CherylS Friday, April 11, 2008 2:56:34 PM

no, we just make sure that what we need from e-rate is covered in the plan

JimC Monday, April 14, 2008 2:46:37 PM

Yes. An example would be that if distance learning/video services were ineligible, I don't believe most of our schools would be able to afford being involved with our distance learning project to satisfy tech plan objectives like making more curriculum and learning opportunities available to students.

Question 4

As you may know, the Internal Connections "2-in-5 Rule" limits Internal Connections funding (excluding basic maintenance) for any given entity to two out of any five consecutive years--with the goal of providing discounts in the Internal Connections service category to more applicants at lower discount rates.

- From your experience and that of your colleagues, do you have any sense whether this rule is meeting its goal? Please explain.

- Do you have any alternative recommendations for sharing Internal Connections discounts to a greater number of applicants?

When you're ready to answer the questions:
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Make sure that you see your response posted!

LaurieW Wednesday, April 09, 2008 9:15:43 AM

I have no sense of the impact of this rule yet. We have just received our first internal connections money since the 1st year of the program and even this money is under appeal because our 90% schools were reduced to 87% during the reveiw proccess. Also, we really try to refresh technology every 4 years in the best interest of our students, so we may lose some funding in the future because of the rule.

Jay Sunday, April 13, 2008 1:16:31 PM

Laurie, it seems as if the "2 in 5" rule is workable with respect to your goal of refreshing technology every 4 years. Do you agree?

DennisB Wednesday, April 09, 2008 10:07:43 AM

That goal is acheiveable, with the exception of the ISP's changing their prices. That price will always seem to go up and not down

KathrynW Thursday, April 10, 2008 9:46:21 AM

I think the SLD thought this rule would lead to funding for Internal Connections reaching "middle class" (for lack of a better term) schools and this is not happening. It is my understanding that the SLD is now reaching out to applicants, trying to eliminate billed entity numbers that haven't been in use for a few years, trying to make the pool of applicants somewhat smaller and to make it easier to track entities that do receive funding for Internal Connections. If the FCC/SLD had some idea of what level of funding they want Internal Connections to reach, they should consider that and then perhaps try to figure out what rule(s) would lead to that.

Some folks have talked about doing away with funding for Internal Connections ("Aren't all the poor schools already wired?"), but I think Katrina has shown that disasters may require schools to be built/rebuilt. Perhaps state-wide, district-wide, consortium-wide attempts at Internal Connections should be considered in a different category, with a different level of discount applied.

KathleenT Thursday, April 10, 2008 10:44:26 AM
I really have no idea of how this is playing out. It hasn't affected the school I am with now.

BonnieT Friday, April 11, 2008 12:47:27 PM
My impression is that the 2 in 5 rule adds just one more layer of confusion and reason for denial. We are going to be making some internal changes due to some changes in what is available. We would have had to know about this possibility 2 years ago to have included them in the plan and request.

CherylS Friday, April 11, 2008 3:02:24 PM
Of our 45 schools we generally have 10 - 15 that fall into the 90% category. We keep those up to date via e-rate and the 2 in 5 rule is not a problem - just ask for all you need in an application not just bits and pieces at a time.

We have filed for 80% schools twice and will never do so again --- waiting 2 or more years for approval causes problems with the vendors and with SLC - we have one vendor who has still not been paid over $100,000 because we originally said the contract would end June 30 of the particular e-rate year and we were not even approved until 8 months after that date - I did the 486 - the company provided the equipment and then applied for re-imbursement -- they were turned down - we filed a form 500 changing the ending contract date and they were turned down AGAIN - supposedly they applied 4 days after another deadline

JimC Monday, April 14, 2008 2:51:27 PM
I believe this rule is meeting its goal in that large equipment purchasing projects are limited to 2 in 5 years, making eligible districts choose projects important to them and their students.

It seems like much of the fraud, waste and abuse of the E-rate program involves equipment purchases. If entities were required to contribute a greater percentage toward equipment purchases (20% - 30%) range instead of just 10% in many cases, their might be less abuse of Internal Connections applications.

Follow-up

After you've answered Questions 1-4 for this topic, please check back sometime before 12:00 midnight Eastern on Thursday, April 10. (Please adjust for your time zone.)

Review the responses of the other participants, and spend some time commenting on their responses--as if you were having a conversation with the group. You're welcome to come back as often as you'd like to see how the discussion is progressing and to add your thoughts.

As of 7 AM Eastern on Friday, April 11, I'll post Topic 3 with new questions for you to answer. You'll have until Sunday, April 13 at midnight Eastern to respond to these new questions and spend some time interacting with the group.

Thanks for your participation thus far!

Topic 3

Read First

In this final topic, we'll be evaluating any anticipated effects if the E-rate program were terminated.

Topic 3 contains only one question. Please complete your answer to Question 1 by Sunday, midnight Eastern time.

If possible, after completing your answer, return to the EDRoom before Sunday midnight to read the comments of other participants and write your reactions to them.

- To read a question, click the tab with its question number above.
*- When you've answered all the questions, click the **Follow-up** tab above.*

Question 1

What impact would there be to your district/library system if the E-rate program were to be terminated in 2009?

Would the goals of your technology plan be attainable? Please explain.

When you're ready to answer the questions:
*1. Click the **Reply** button above.*
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*3. Click the **Save** button (at the top right of the word processing tool) to post your response.*

Make sure that you see your response posted!

BonnieT Friday, April 11, 2008 12:53:07 PM
Oh my Gosh -- Devastating. We are a small library system that relies on taxes for our county and state funding. We were asked to reduce our county budget by 5% and our state funding was reduced by 20% last year. I am anticipating a decrease to both sources again this year. To suddenly need a 10% increase due to increased communication costs could mean not keeping the doors open at one of our remote library branches.

KathrynW Friday, April 11, 2008 2:08:00 PM
The majority of schools/school districts/libraries get some monies from E-Rate so devastating is a good term for what would happen if E-Rate funding ceased July 1, 2009. Just considering Category 1 services (telecom and Internet access), I think Congress would have to give a 3-4 year "weaning" period to all the schools and libraries before cutting off E-Rate funding. Given that poorer entities get more money, imagine the cuts that would have to take place if E-Rate was stopped July 1, 2009: fewer opportunities to use computers at public libraries because they would have to cut their bandwidth, cut operating hours, cut staff; schools would also have to reduce the amount of time students have access to a computer, including distance learning; cut the use of cell phones for school bus drivers or teachers or teachers aides or school/library administrators; cut the number of classrooms with a telephone; cut the number of telephone lines a library has; cut the use of WiFi.

Given the current state of the economy, it wouldn't be long before we would be back in the 1990s.

CherylS Friday, April 11, 2008 3:14:32 PM
would it hurt? I agree with BonnieT -- DEVASTATING -- the funds assist us in keeping some of our school's internal connections up-to-date and even more important - we apply for reimbursement of our percentage of the telecommunications funds --- this money makes the difference between being able to spend money on technology initiatives for our schools and having nothing -- the state took our tech incentive funds 2 years ago and rolled them into general funds to the districts --- our district was good enough to provide the funds to us still but next year with the HUGE budget shortfalls in Florida the money is staying with the general fund - without e-rate there will be nothing for technology for our schools

KathleenT Sunday, April 13, 2008 1:02:27 PM
As far as our single small school goes, the impact would be cascading. If we didn't have E-rate funds for our basic internet connections, we would most likely try to come up with the money to support our T-1 connection. That would impact our budget greatly in terms of other areas of technology that we could afford to support. It would lead to a decrease in hardware/software purchases and support for integration of technology in the classroom. Ultimately, the impact on the students would be huge.

LaurieW Monday, April 14, 2008 7:45:11 AM
Even though this reply is a little late, I agree. The cessation of the program would be terrible for us as well. We are a large school sysytem, but we have a very tight budget. It's hard not to become dependent on these funds since we've been using them for 11 years!

JimC Monday, April 14, 2008 3:01:33 PM
The impact would be devastating! Schools and libraries might be able to go back to paying full price for their telephone bills but may not be able to afford the cost of adequate Internet access or more advanced telecommunications services like distance learning or video services necessary in more rural areas to keep up with educational opportunities.

Tech plan goals of increasing educational opportunities would be less attainable.

Follow-up

After you've answered the question for Topic 3, please check back sometime before 12 midnight Eastern on Sunday, April 13. (Please adjust for your time zone.)

Review the responses of the other participants, and spend some time commenting on their responses to the question--as if you were having a conversation with the group. You're welcome to come back as often as you'd like to see how the discussion is progressing, to interact with the group, and to add your thoughts.

Thanks so much for your valuable contributions to our discussion!
