

E-rate Training for Beginners – Libraries

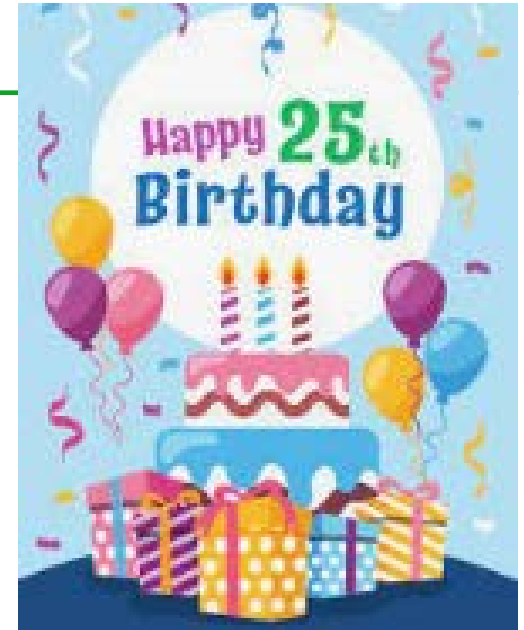
Funding Year 2023



Presented by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
Fall 2022

Agenda for Today

- Overview
- Eligible entities
- One Portal/EPC
- Eligible Services and Equipment
- Discount Calculations
- Category 2 Budget Calculations
- Application Process, step-by-step



- Questions taken at the end of each section. Please ask!!!
- Copy of presentation available at: http://e-ratepa.org/?page_id=745

What is E-rate?

- Annual \$3.9 billion federal program
 - Funding does not come from federal budget
- Provides 20-90% discounts on eligible services and equipment
- Bedrock principles:
 - All equipment and *almost* all services must be competitively bid on USAC website for at least 28 days
 - Applicants **MUST** pay their non-discounted share (cannot be waived)
 - For example, if your discount is 60%, you must pay 40%
- FCC sets all rules and policy
 - USAC (SLD) manages the program/application process
 - CSC = Customer Support Center answers questions
 - **888-203-8100**
 - PIA = Program Integrity Assurance team reviews applications/invoices
- Program is highly deadline restrictive
- Application process begins 6-12 months before funding year begins

How to Be E-rate Successful

- Read (and distribute) listserve messages
 - Are you on the PA E-rate listserve? (e-mail Julie, if not)
 - Are you subscribed to the USAC E-rate Newsbrief?
<https://fe391570756406797d1477.pub.s10.sfmc-content.com/3n2usens2cz>
- Document and retain everything
 - Stay organized!
- Use PA E-rate website: www.e-ratepa.org
 - Helpful Documents
- Attend content-specific webinars
- Have patience



What Entities are Eligible in PA?

- Public libraries that are eligible for LSTA funding
 - Includes bookmobiles
 - Admin buildings, data centers, etc. (NIFs)
 - Only eligible for broadband/internet services (not equipment)
- Every “organization” has an E-rate Billed Entity Number (BEN)
 - This entity pays the bills to the vendor
 - Every “building” must have an Entity Number
 - Call USAC to obtain Entity Numbers for new buildings
- Each Billed Entity (BEN) has an EPC Account (E-rate portal)
- Every EPC Account has “Users”
 - One (and only one) of the Users is the Account Administrator (AA)
 - ‘Related Actions’ is where most account management tasks are found
- **Call USAC at 888-203-8100 for EPC assistance**



E-rate Classifications for Various Libraries

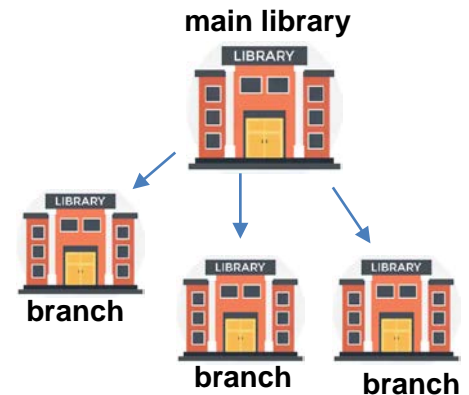
1. Independent Library

- Stand-alone library, not a branch



2. Library System

- Defined as library that has branches



3. Consortium

- Can be made up of one or more independent libraries
 - Consortia “lead” may or may not be an actual library
- Regional (Federated) library systems that procure services on behalf of independent libraries would be considered a “consortium” under E-rate rules
 - Not a “library system” as they’re known in PA



E-rate Eligible Services and Equipment



Categories of Service

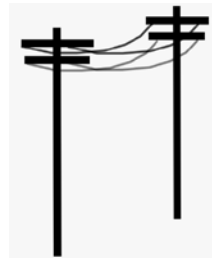
- **Category 1** – Services that go TO the library

- Subcategories:

- Data Transmission Services (fiber, coaxial cable, etc.)
- Internet Access

- Maximum discount is 90%

- No E-rate funding caps



- **Category 2** – Services/equipment that go INSIDE the library

- Subcategories:

- Internal Connections
- Basic Maintenance of Internal Connections
- Managed Internal Broadband Services (MIBS)

- Maximum discount is 85%

- Subject to 5-year “C2 Budget” (funding cap)



Category 1 Eligible

Most Common:

- Leased Lit Fiber
- Cable Modem/DSL/FIOS
- Microwave Service
- Internet Access

Also Eligible:

- Wireless data plans *
 - If no Wi-Fi access, must prove that data plans are most cost-effective option
- Satellite, leased dark fiber*, self-provisioned fiber*, BOPL, etc.
- Special Construction Charges
 - Costs for vendor to build-out network
- Installation Charges
 - One-time charge to “turn on” service

Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

* Additional bidding requirements apply

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option

- Schools and libraries seeking “Commercially-Available Business Class Internet Services” are not required to file a Form 470
- Commercially Available means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
 - In layman’s terms, this means an internet service that is available on a vendor’s website for its business customers.
 - Typically only Cable-Modem, DSL, or FIOS Internet Service
- Minimum speeds must be 100 Mbps downstream and 10 Mbps upstream
- Cost must be \$3,600 or less annually (pre-discount)
 - Cost must be per-building and cannot be averaged across multiple buildings
 - \$3,600 includes any installation costs, equipment rental, taxes and fees

The CABIO option is geared to small libraries and small non-public schools using cable modem-type services

What's Eligible for Category 2 Funding?



3 Sub-Categories for C2

- Internal Connections (main)
- Basic Maintenance (BMIC)
- Managed Internal Broadband Services (MIBS)

Internal Connections Eligible

- Wireless Access Points/Controllers
- Network Routers & Switches
- In-Building Structured Cabling
- Caching Servers
 - Only eligible servers
- Firewalls
 - No advanced functions are eligible, like anti-spam, anti-virus, etc.
- Racks and UPSs
 - That support eligible equipment only
 - Network cards aren't eligible
- Equipment licenses
 - Multi-year licenses can be requested in first year
- Cloud-based functionality of this equipment
- Operating system software to support eligible equipment
- Installation and configuration
 - If wanted, be sure to specify this in your 470/RFP
- Taxes and fees
- Basic training on use of equipment
- **Not eligible:**
 - **Storage Devices**
 - **Voice/Video Components**
 - **End User Devices**

When Must You Bid a Service/Equipment?

A Form 470 must be filed to bid...

- 1) If a service is covered on a Month-to-Month basis (meaning no contract exists – these are mostly cable modem-type services);
- 2) At the beginning of any new contract
 - If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2024, you are not required to file a Form 470 for FY 2023
- 3) If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract
- 4) All Category 2 equipment and services

**** Form 470 NOT required when using CABIO**

Contract extensions:

- Contract extensions are permitted to be included in the original contract
- Must have a definite end
 - **OK:** For example, a 3-year contract, with two 1-year renewals. Will not require new 470 until the end of 5 years
 - **NOT OK:** 3-year contract that automatically renews. Will require new 470 at the end of 3 years

Discount Calculations



Library Discount Calculations

- **Independent Library** (most PA libraries):
 - Discount based on the % of students eligible for the NSLP in the school district in which that library is located, and whether the library is located in an urban or rural area
- **Library Systems:**
 - Discount based on the % of students eligible for the NSLP in the school district in which the system's main library is located
 - and*
 - The % of libraries in rural areas
 - If more than 50% are located in rural areas, then the rural discount should be used
- **PA Federated Library Systems**
 - Made up of several independent libraries
 - Where System procures shared services, such as WAN/Internet
 - System would file as a **Consortium**
 - **Discount calculate by taking simple average of all consortia members' discounts**

Discount Matrix

Category 1

Category 2

Income % of students in the school that qualify for the NSLP...	Category 1 Urban Discount	Category 1 Rural Discount
Less than 1%	20%	25%
1% to 19%	40%	50%
20% to 34%	50%	60%
35% to 49%	60%	70%
50% to 74%	80%	80%
75% to 100%	90%	90%

Category 2 Urban Discount	Category 2 Rural Discount
20%	25%
40%	50%
50%	60%
60%	70%
80%	80%
85%	85%

Category 2 Budget Calculations



Category 2, 5-Year Funding Caps

- Current C2 budget cycle = Funding Years 2021 – 2025
 - All C2 budgets will reset in FY 2026 and no funding will be carried over
 - C2 budgets are *pre-discount*
 - Applicants' E-rate discounts then apply

C2 Budget Calculations:

Single Libraries:

$\$4.50 \times$ square footage of library (including areas off-limit to the public)

OR

\$25,000

-- whichever total budget is greater

Library Systems:

$\$4.50 \times$ square footage of all libraries in the system **OR**

\$25,000 x total number of libraries in the system

– Whichever total budget is greater

Hybrid Calculation: For systems with 10 libraries or less, EPC will automatically calculate by library and take the higher amount (\$25,000, or square feet * \$4.50) from each library and add together

Category 2 Pre-Discount Budget

5-Year C2 Budget Cap*	E-rate Discount	E-rate Will Pay:	Library's Share %	Library Must Pay:
\$204,475	60%	\$122,685	40%	\$81,790

* The C2 Budget Cap is the **pre-discount price**. E-rate discounts will then apply **on top of** the budget cap. In this example, district would still owe their 40% non-discounted share

- Future funding years: To determine what **“remains”** in a C2 budget for future years in the C2 “cycle”, take the 5-Year Budget Cap and subtract the pre-discount amounts of what has been “committed” in the previous year(s) of the C2 cycle

What is YOUR Remaining Category 2 Pre-Discount Budget?

- <https://opendata.usac.org/E-rate/E-rate-C2-Budget-Tool-FY2021-/8z69-hkn7>
 - Enter BEN to filter just your entity's data

▼ Filters (1) ✕

[Clear All](#)

State

Applicant Type

City

Billed Entity Name

BEN

Consulting Firm Name (CRN)

How Does USAC Obtain Enrollment & NSLP Data?

- Short answer: Each school updates their EPC profiles annually during an “Admin Window”
 - System automatically calculates discounts
 - Discount Data is then be ported into E-rate application from EPC
 - For Funding Year 2023, Admin Window is open October 25 – early Jan
- Libraries do not enter enrollment/NSLP data
 - EPC linked to school district in which the library (or main library in a system) is located
 - Libraries only update changes to square footage for each building, if any

The Application Process



Application Process Overview

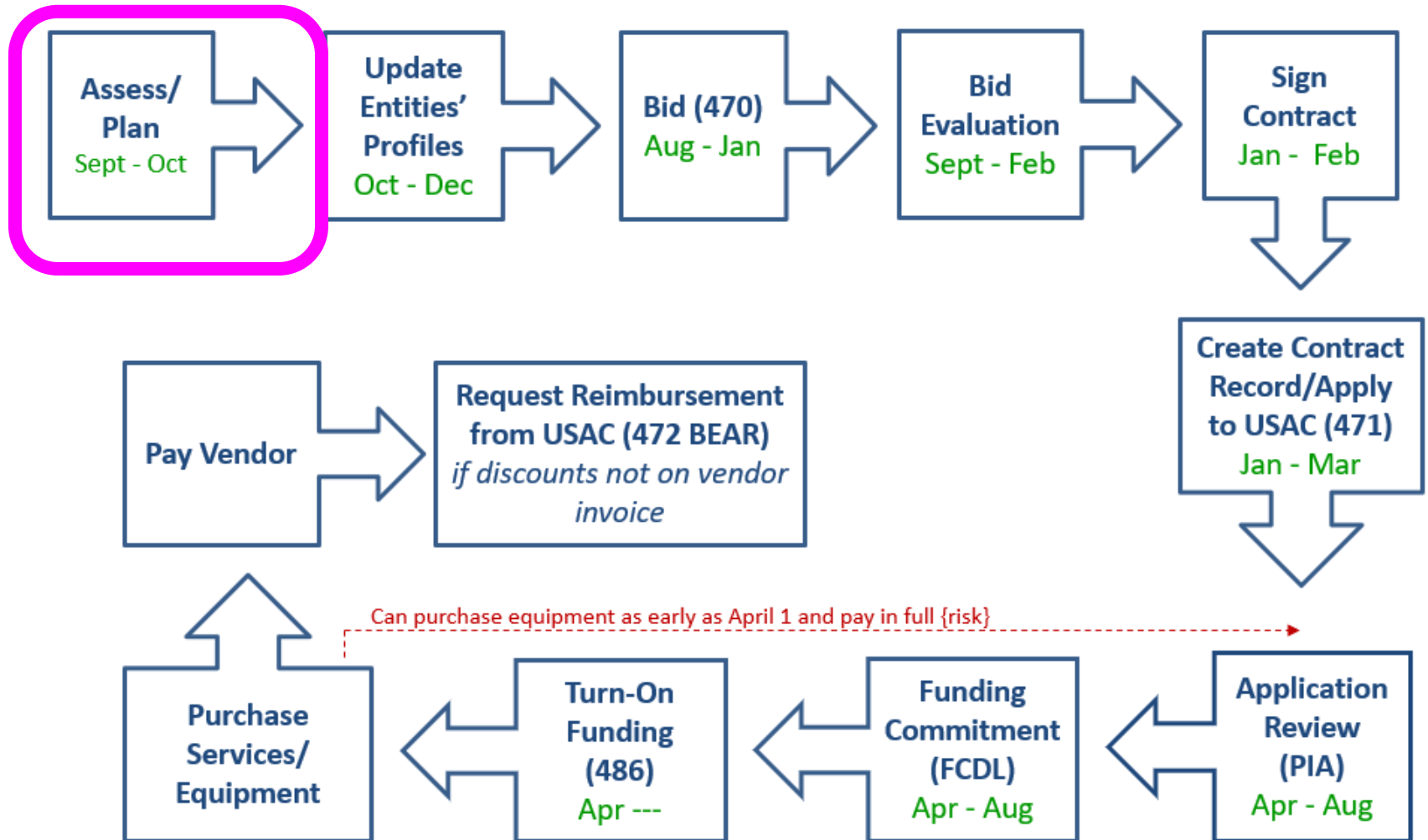
E-rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - November
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now – early December
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-rate Funding – Form 471	February – March 25? (deadline TBA)
7) Application Review – PIA	April - August
8) Funding Commitment – FCDL	April - August
9) Turn-On Funding/CIPA Compliance – Form 486	FCDL receipt – October 28
10) Receive Services	July 1, 2023 – June 30, 2024
11) Pay Vendor	July 1, 2023 – June 30, 2024
12) Submit Invoice to USAC – Form 472 BEAR if paid vendor bill in full (vendor submits Form 474 SPI to USAC if you received discounted bills)	October 28, 2024 (deadline)

FY 2023 Application Cycle

- Funding years named for the year in which they begin
 - FY 2022 = July 1, 2022 – June 30, 2023
 - FY 2023 = July 1, 2023 – June 30, 2024
 - Application process begins 6-10 months ahead of start of next funding year

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486	CIPA Certification/Turn on Funding							April 2023 - Sept 1, 2023												Sept 1, 2023 - Sept 30, 2024											
472	BEAR Deadline - Recurring Services																									Oct 28					
	BEAR Deadline - Non-Recurring Services																													Jan 28	

Step 1... Assess Needs and Plan

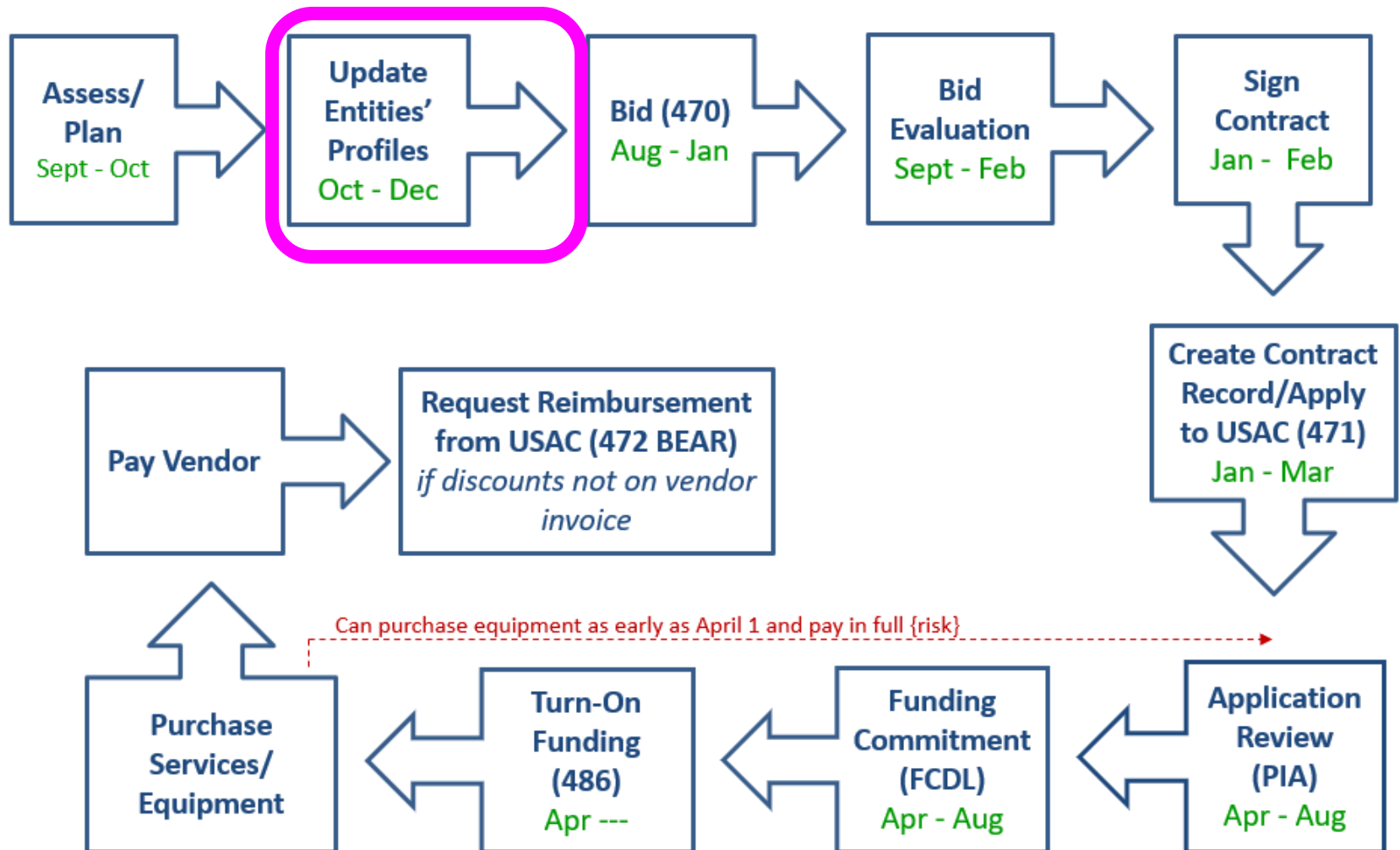


Step 1: Assess Need & Plan

- **When?** September/October/November
 - **Category 1:** Review existing contracts to determine when they expire
 - Extend, if options available
 - Must have documentation to vendor of request to extend
 - If contract expiring, decide if upgraded services are needed
 - **Category 2:** Determine what equipment/wiring is over next 12 months
 - Research options, prepare bid-list
- Review Julie's List of C1 Contract Expiration Dates**
- Coming soon to listserve



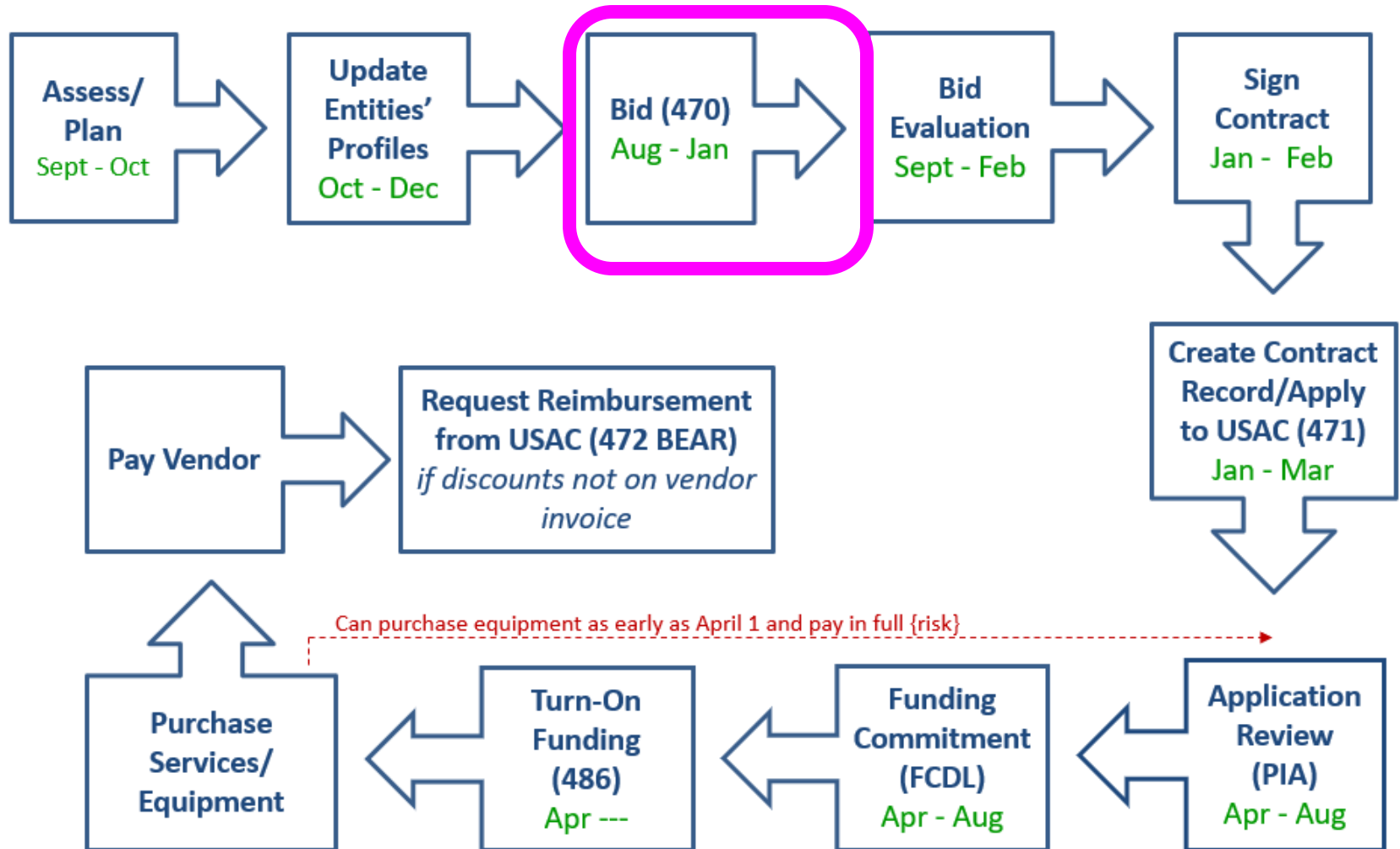
Step 2... Update Entities' Profiles



Step 2... Update Entities' Profiles



- **Update Entities' Profiles during Administrative Window each fall**
 - 3-months when schools must update enrollment/NSLP data for each school
 - Data cannot be changed when Admin Window closes
 - Why? Libraries and consortia rely on schools' discount data to calculate their discounts
 - EPC linked to school district in which the library (or main library in a system) is located
 - Libraries do not enter this data
- Libraries just update square footage/address changes, if any

Step 3... Post Form 470s



Step 3: Posting the Form 470

Purpose of the Form 470

- Online form to notify vendors of services and equipment for which you are seeking proposals
 - All equipment/services for which you will seek funding on the Form 471 must have been posted on a Form 470 (except if using CABIO)
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
 - List bid due date in text box 
 - Build in an extra 2 weeks for vendor question deadline 
- You are NOT obligated to purchase any service/equipment listed on Form 470
- Category 1 and Category 2 can be filed on the same 470

When Must a Form 470 be Posted?

A Form 470 must be filed:

- 1) If a service is covered on a Month-to-Month basis (meaning no contract exists – these are mostly cable modem-type services and you're not using CABIO);
- 2) At the beginning of any new contract
 - If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2024, you are not required to file a Form 470 for FY 2023
- 3) If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

Contract extensions:

- Contract extensions are permitted to be included in the original contract
- Must have a definite end
 - **OK:** For example, a 3-year contract, with two 1-year renewals. Will not require new 470 until the end of 5 years
 - **NOT OK:** 3-year contract that automatically renews. Will require new 470 at the end of 3 years
- Must notify vendor if you want to exercise one of your contract extensions
 - Can be as simple as an e-mail; some vendors want contract amendment
 - USAC will ask for this during your application review

When to File the Form 470

Deadline: Form 470 must be posted online at least 29 days before the Form 471 window close

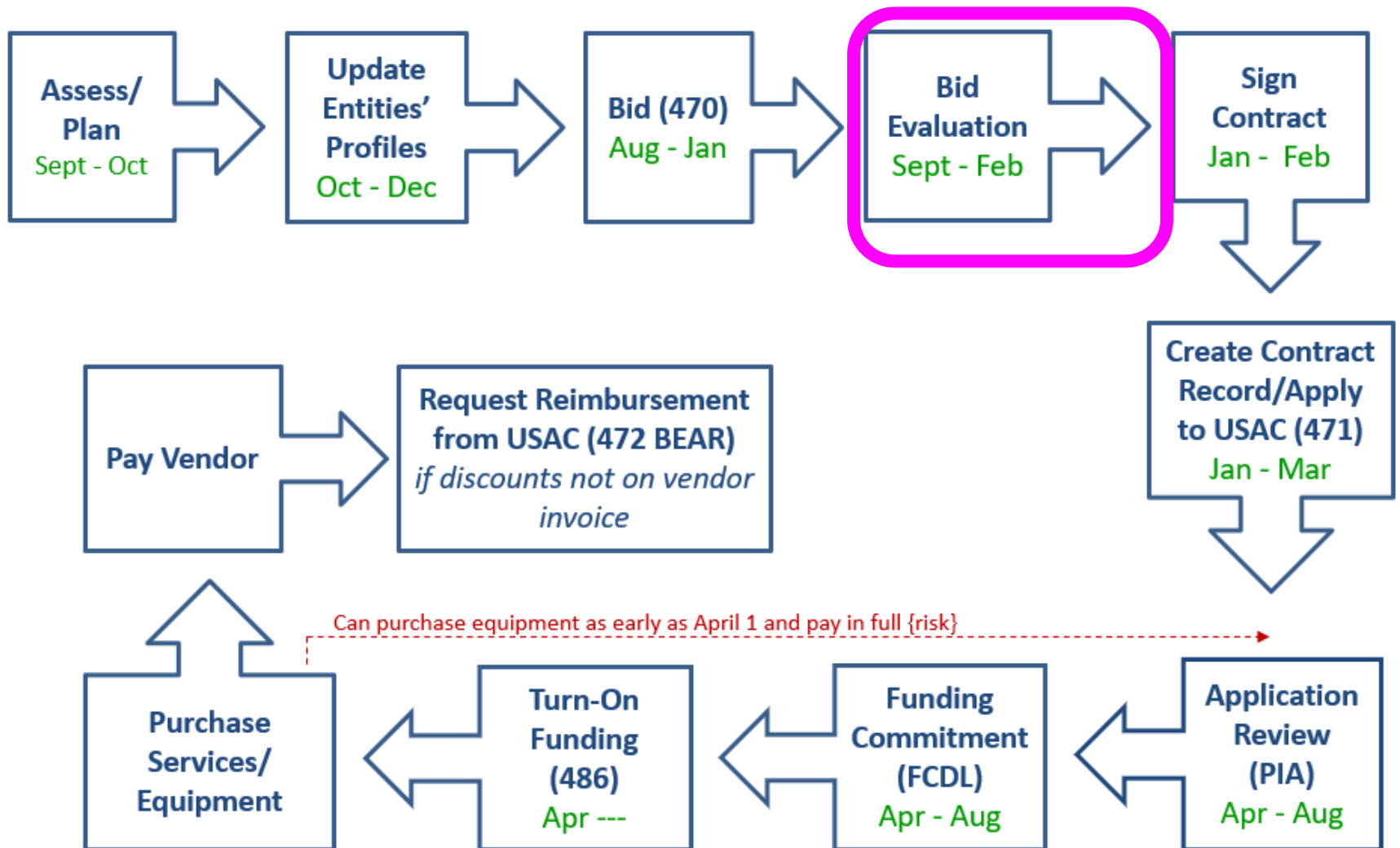
For example:

- If Form 471 deadline is March 25; therefore...
- February 25, 2023 = 470 Deadline
 - DO NOT wait this long! Gives you 1 day to evaluate bids, negotiate contracts, seek board approval, sign contracts, and then file the Form 471 by the 471 deadline
 - File 470 before December 1, if possible
- **Helpful Form 470 and RFP Narrative Guide at:** <http://e-ratepa.org/wp-content/uploads/2014/03/8-5-RFP-Form-470-Narrative-Guide-FY-2023-PA-NEW.pdf>
- **C1 Form 470 Filing Guide:** <http://e-ratepa.org/wp-content/uploads/2014/03/8-2-Category-1-Form-470-Filing-Guide-FY-2023.pdf>
- **C2 Form 470 Filing Guide:** <http://e-ratepa.org/wp-content/uploads/2014/03/Category-2-Eligibility-Form-470-Bidding-Guide-Non-Public-Schools-and-Libraries.pdf>

During the Bidding Period...

- After the Form 470 has been posted online, vendors submit proposals directly to the library
- Proposals must be accepted for a minimum of 28 calendar days
 - Applicants should specify a bid deadline in the Form 470/RFP
 - Can be longer than 28 days
- Vendors will contact you if they need additional information
- When contacted by a vendor, you must indicate your willingness to receive a proposal for services listed on Form 470
 - Do NOT say you are just going to stay with your current vendor
- May conduct pre-bid meeting with vendors

Step 4... Evaluating Bids



Step 4: Evaluating Bids

- After the bid due date (which must be at least 29 days after 470 is posted), applicant must review all qualified bids received for all services or equipment
- Must create and retain bid evaluation matrix

Price of eligible services/equipment MUST be the most heavily weighted factor during bid evaluation

- Retain all winning and losing bids and all correspondence between applicant and all vendors (winning and losing)
- Helpful Guide: <http://e-ratepa.org/?p=33972>
- If no bids received, document and seek cost effective pricing proposals

Disqualifying a Bid

- In order to DQ a bid, the bid disqualification reason must have been stated in the Form 470 or in the RFP
- **DQ reasons must be yes/no (either they complied or they did not)**
- *Examples:*
 - Equipment must be compatible with library's existing XXX equipment
 - Be sure to then list the existing equipment in the district
 - Equipment cannot be refurbished or "gray market"
 - Vendor must be willing to provide discounted bills
 - Vendor must attend pre-bid walk-through
- When disqualifying a bid, make a note of the exact reason for DQ reason and show where it was stated in the 470 or RFP

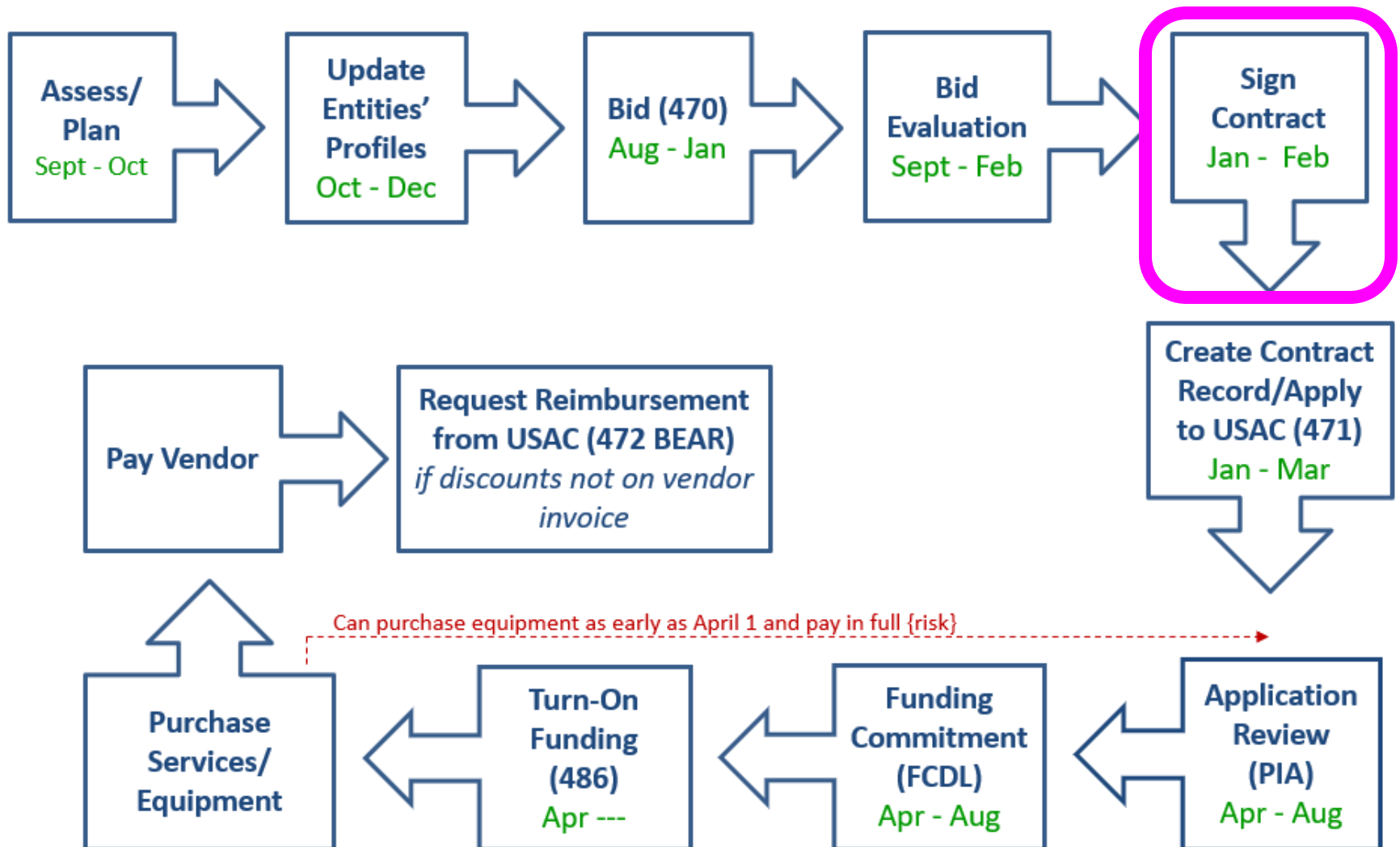


Bid Evaluation Matrix Example

Factor	Points Available	Vendor A	Vendor B	Vendor C
Proposal Cost		\$750	\$800	\$1000
-- Weighted Points (% to lowest bid)		100%	80%	75%
Price of Eligible Services/Equipment (weighted)	60	60	48	45
Ability to Meet Installation Timeline	20	10	10	20
Quality of Proposed Solution	10	10	10	10
References	10	8	8	5
TOTAL POINTS		88	76	80



Step 5... Signing Contracts



Vendor Contracts

- Contracts must be signed/dated by the applicant before you submit Form 471
 - Unless receiving services on month-to-month basis
 - Vendor can sign after the Form 471 deadline
- Cannot select 2 vendors to provide the same service
 - FCC believes there should always be one bidder that is more 'cost effective' than any other
- Do not accept vendor's standard Ts & Cs

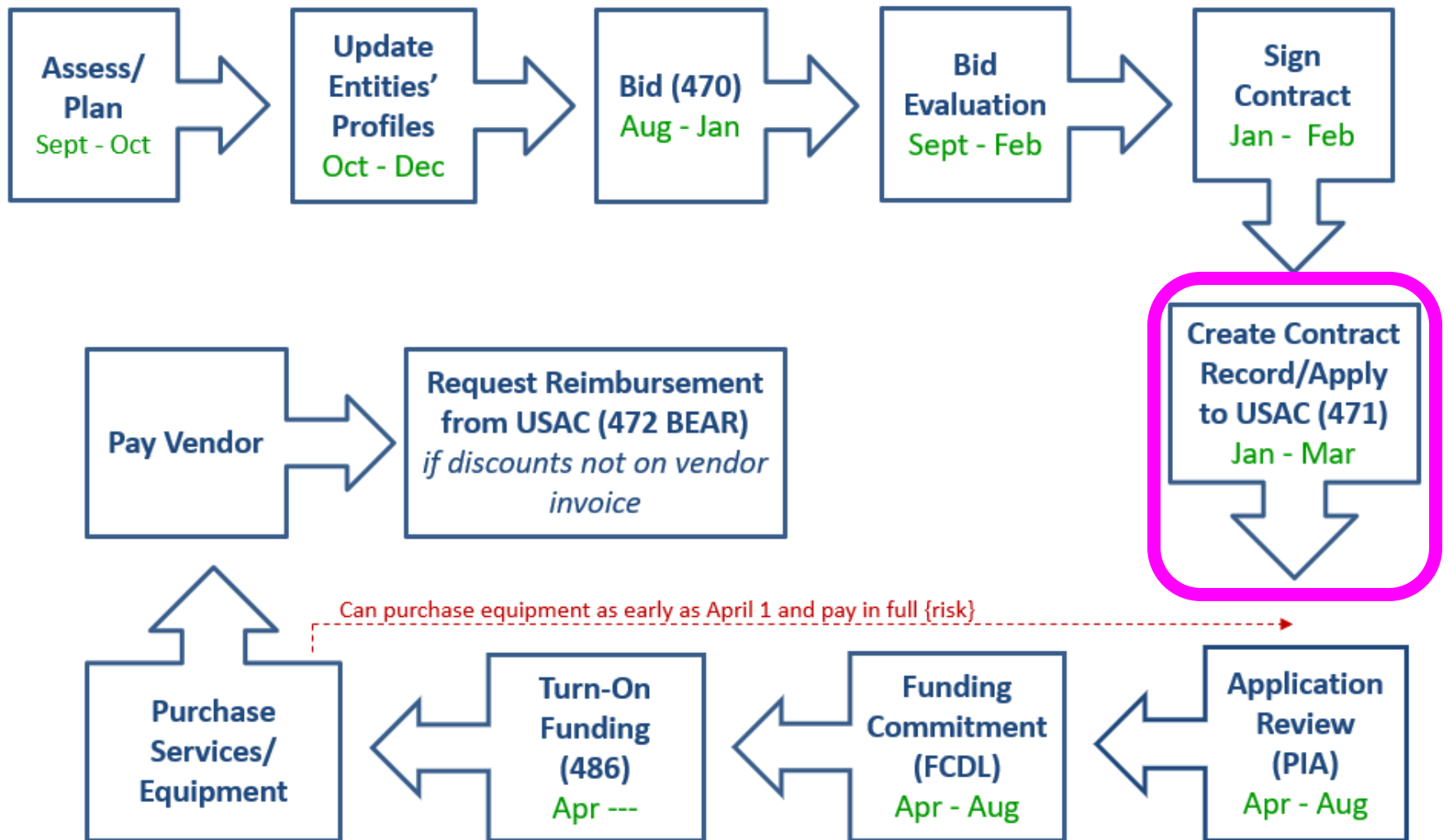
TIP!

Negotiate!

- Contract guidance available at: <http://e-ratepa.org/?p=33992>



Step 6: Contract Records/Applying for Funding (Form 471)



Step 6a: Upload New Contracts into EPC

- If you signed a new contract, you must create a “Contract Record” in EPC before starting the Form 471
- Data collected:
 - 470 used to bid service
 - Contract signing date
 - # of bids
 - How many contract extensions, if any
 - Service provider selected (SPIN)
- Details from Contract Record will then be ported over into Form 471
- There is no way to edit a Contract Record after it has been submitted
 - Simply create a new Contract Record with the accurate information
- Assign is a very descriptive nickname
 - Recommended: Service – Vendor – Year Signed



Step 6b: Filing the Form 471

Purpose of the Form 471

- Filed by entity that actually pays the bills (the Billed Entity)
- Formally requests E-rate funding commitments from USAC
- Asks detailed questions about services or equipment
- Shows which entities are receiving service
- Shows discount calculations (from EPC)
- Links to a Contract Record(s) to show which Form 470 was used to bid services, contract signing dates, contract amounts, etc.

Funding Requests

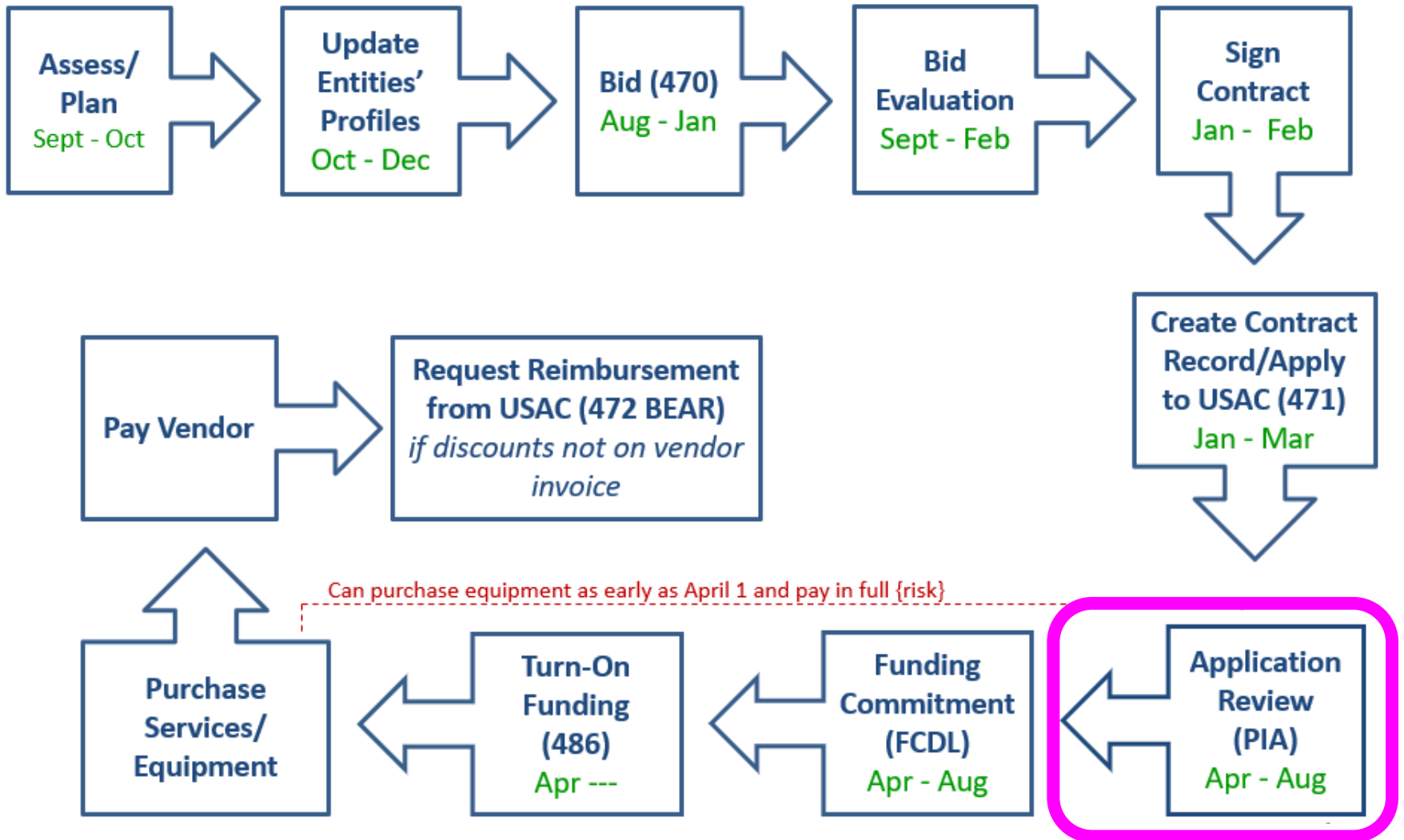
- Each separate funding request is assigned a number, called a Funding Request Number (FRN)
- Each FRN is “built” by adding FRN Line Items

When and How Many to File

- **471 Application Window: early January – mid March**
Do NOT miss this deadline!
- Must be filed in EPC
- Category 1 and Category 2 must be filed on separate applications
 - Multiple applications are ok
- Read the listserve messages for important filing tips



Step 7: PIA Application Review



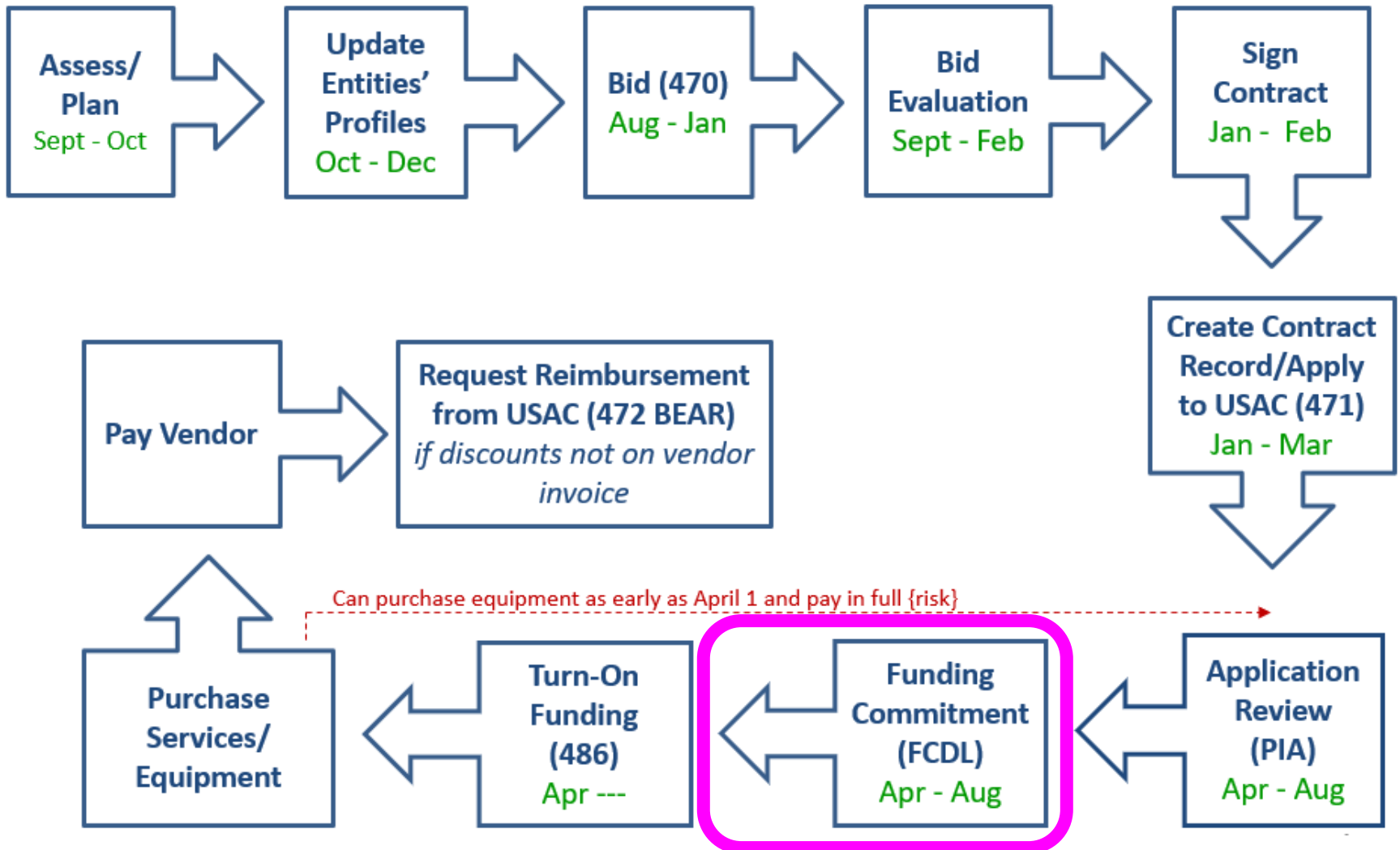
Step 7: PIA Review

Program Integrity Assurance (PIA) Review

- USAC team that reviews all applications submitted within the “Form 471 Window” and makes determination on funding approval/reductions/denials
- Checks for rule compliance
 - Eligible services
 - Eligible entities
 - Appropriate discount level
 - Competitive bidding violations
 - Category 2 budget levels
- The 471 main contact will receive an email notification that PIA questions are pending in EPC about their application
- Applicants have 15 days to respond
 - Can seek a single, 1-week extension
- PIA will notify if they intend to deny or reduce request



Step 8: Funding Commitment Decisions



Step 8: USAC Issues FCDL

FCDL = Funding Commitment Decision Letter

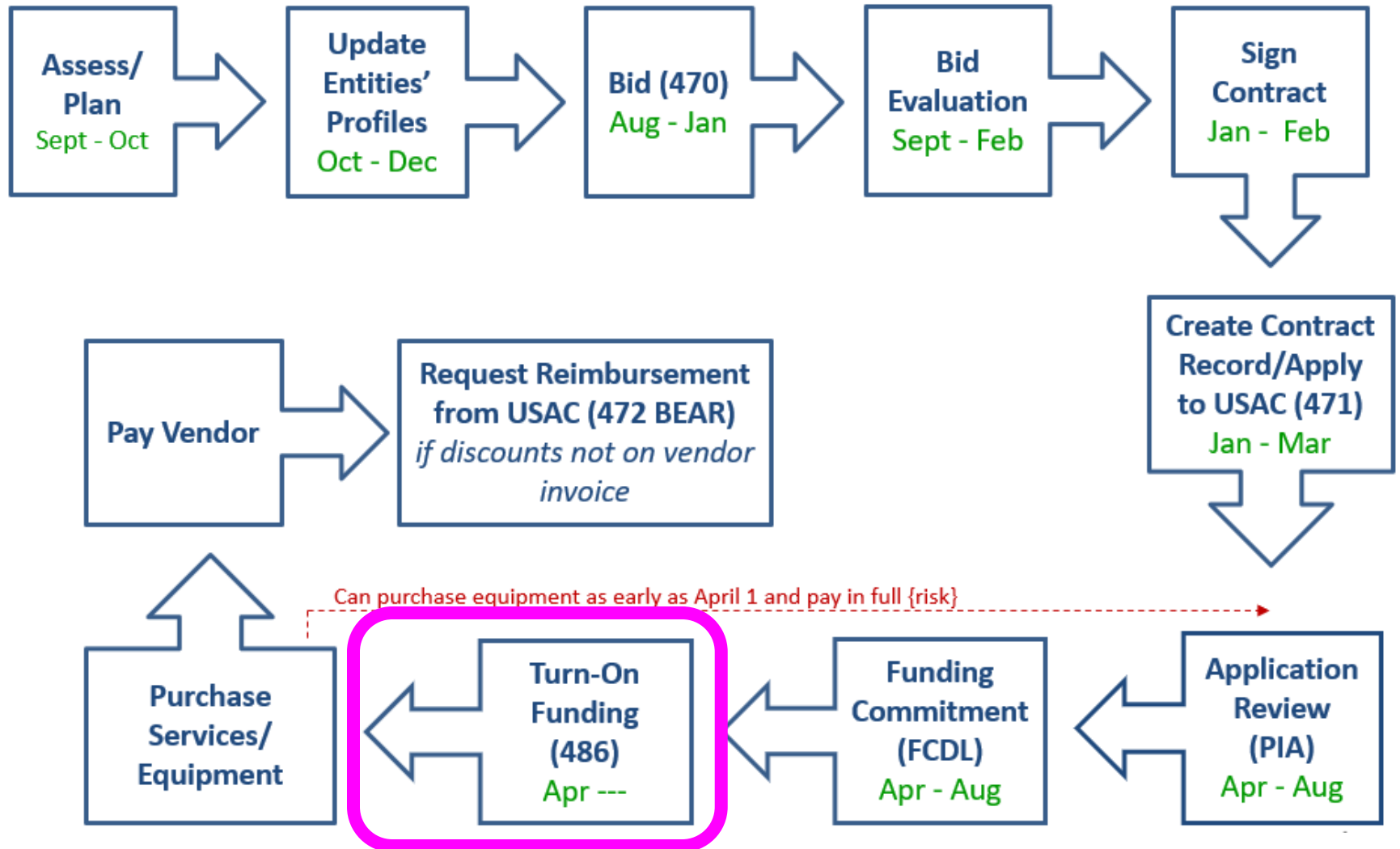
- Funding “waves” are released weekly (usually waves issued on Thursdays)
 - Goal is to have all “workable” applications funded by Sept 1
- FCDLs e-mailed to Form 471 contact and EPC AA
- Gives approval decisions of each funding requests (FRNs) on Form 471
- Can appeal within 60 days if you don’t agree with their decision
 - Appeal to USAC first
 - Can then appeal to the FCC if USAC denies



Watch PA E-rate listserve for weekly wave notices!



Step 9: Filing the Form 486



Step 9: Form 486



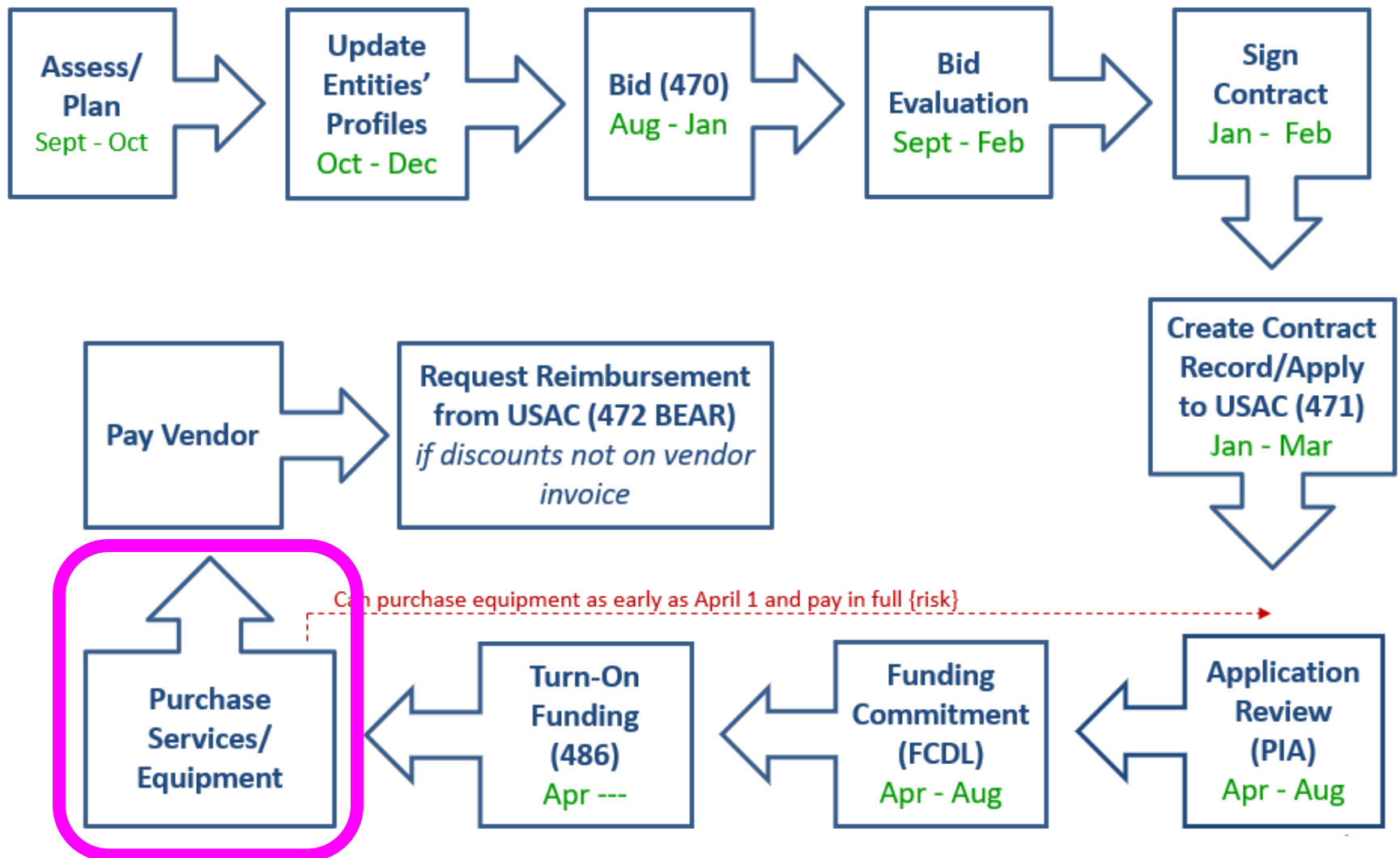
Form 486 Receipt of Services Form

- Informs the SLD that services have (or will) **start**, and
- Informs the SLD that your school or library is **CIPA** compliant
- Can only be filed after the FCDL has been issued
- Neither BEAR and Vendor invoices can be paid until the Form 486 has been submitted and approved
- Form 486 is **very** simple! Almost all data fields pre-populated

Deadline: 120 days after FCDL date or 120 days from start of services, whichever is later

October 28 is typically the deadline for applicants

Step 10: Receiving Services/Equipment



Category 1 Delivery Timeline

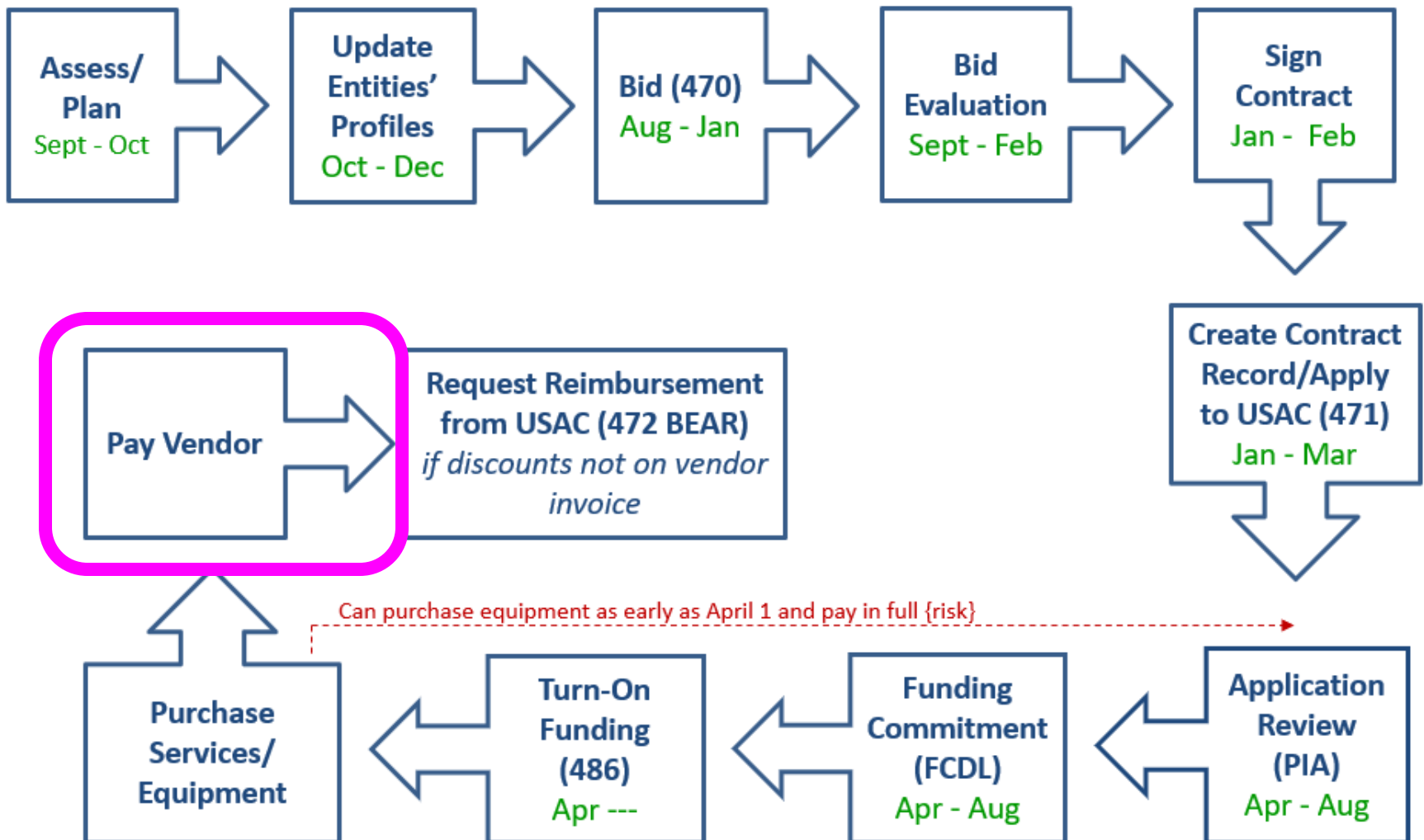
- Category 1 services must be delivered between July 1 – June 30
- **Installation** may occur as early as January 1 or contract signing date, whichever is later
 - Services may not BEGIN until July 1

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Category 2: Purchasing Reminders

- ✓ Create and Maintain Asset Inventory
 - All audits require this to be submitted
 - Sample: <http://e-ratepa.org/wp-content/uploads/2014/03/Asset-Register-Sample.xlsx>
- ✓ Only purchase exact equipment that was approved on 471
 - If equipment is different, seek a **Service Substitution** from USAC
- ✓ Keep everything
 - E-rate rules now require you to keep all documents related to procurement, purchasing, discount calculations, invoicing for 10 years from the last date to receive service or service delivery deadline, whichever is later

Step 11: Paying for Services/Equipment

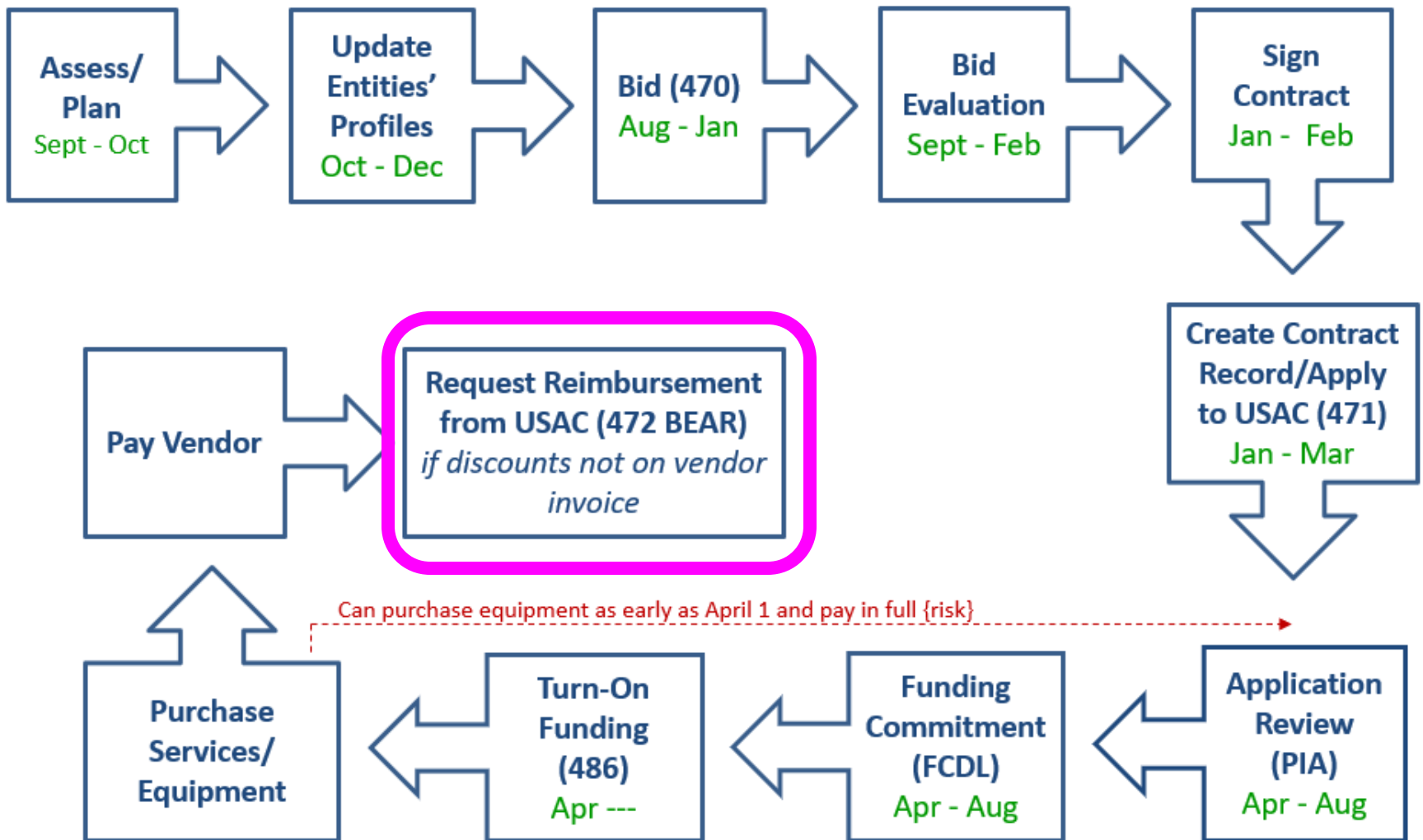


Paying for Equipment/Services

- Applicant's choice
 - **Discounts** on bills (vendor invoices USAC)
or
 - **Reimbursement** process (applicant pays bills in full, then invoices USAC)
- Must select one or the other for entire year for each FRN
- Vendors often have additional form to complete so they know exactly which option is selected, and which account # to discount
- If you want discounted bills, notify your vendor after contract signing, as soon as you are funded
- Applicants must always pay their non-discounted share



Step 12: Requesting Reimbursements



Reimbursement Method - BEAR

- If applicant pays the vendor invoice in full, applicant submits Form 472 – BEAR Form to USAC for reimbursement
- Must have permission to file BEAR in EPC
- Calculated based on eligible charges on actual bills

Deadline:

- October 28 (following close of funding year) for recurring services;
- January 28 for non-recurring services/equipment
- Can request 1 extension if request is submitted by original invoice deadline

Reimbursement Method - BEAR

- USAC approves BEAR and sends payment to applicant's bank account via EFT
- Payments:
 - Payments made on Mondays and Thursdays
 - *Remittance* contact receives e-mail notification
 - *Form 486* contact receives paper BEAR notification
- Bank account info submitted on Form 498
 - Only submitted once
- To determine if you have an approved Form 498:
 - Log into EPC > Records > Form 498s > Click on 498 if one is showing to see the Status
 - If no 498 is showing, then there isn't one on file with USAC



Application Process Timeline

E-rate Step	Suggested Timeline
Assess Needs/Create Your Plan	August - November
Update EPC Profiles - Admin Window	Oct - early January
Bid All New Services/Equipment – Form 470 (<i>unless using CABIO</i>)	Now – early December
Bid Evaluation	January/February
Sign Contracts	January/February
Request E-rate Funding – Form 471	January – March xx?? (deadline TBA)
Application Review – PIA	April - August
Funding Commitment – FCDL	April - August
Turn-On Funding/CIPA Compliance – Form 486	FCDL receipt – October 28
Receive Services	July 1, 2023 – June 30, 2024
Pay Vendor (<i>if not receiving discounted bills</i>)	July 1, 2023 – June 30, 2024
Submit Invoice to USAC – Form 472 BEAR if paid vendor bill in full (vendor submits Form 474 SPI to USAC if you received discounted bills)	October 28, 2024 (deadline)

What's Next? Get Started Now!

- Do you need to file Form 470 for C1? For C2?
 - Don't file a C1 470 if:
 - You are using CABIO bidding exemption
 - You are under a multi-year contract that was previously bid with a Form 470
- File Form 471 by March 15? to seek E-rate funding
- Update square footage in EPC, if any, by January 5

Any questions?

Don't forget....

- Sign up for listserves

- Are you on the PA E-rate listserve? (e-mail Julie, if not)
- Are you subscribed to the USAC E-rate Newsbrief?

<https://fe391570756406797d1477.pub.s10.sfmc-content.com/3n2usens2cz>

- Read E-rate Onboarding Guide: http://e-ratepa.org/?page_id=747

- Become EPC User for your library

- Attend future trainings and use guides at www.e-ratepa.org

