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E-Rate Training Wednesday, January 17, 2024

Chesterfield Technical Center at Hull Street, Fulghum Center

13900 Hull Street N., Midlothian, VA 23112, 804-639-8668

8:30 A.M. - 4:00 P.M.

Trainers: Dr. Susan Clair, (DOE), Cindy Johnson, Doug Leslie, VITA

**OUTCOMES AND AGENDA**

The following agenda will empower our E-Rate applicants to gain a deeper understanding of E-Rate processes, procedures, and the regulations that govern the program. The trainers will use concrete examples and scenarios that help participants understand the program in context, and use storytelling, and miniature case studies with fictitious characters for a more lively discussion. We expect the following outcomes as a result of this training:

* Participants will feel a stronger sense of efficacy in overseeing and managing the E-Rate program in their school divisions.
* Participants will utilize various documents, information and resources independently after the training in support of their work..
* Participants will apply what they learn in the E-Rate training to their FY2024 E-Rate applications.

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| **TIME** | **ACTIVITY** | **RESOURCES** |
| 8:00-8:30 | **Breakfast and Networking**: Participants, trainers, and service providers will mingle while enjoying coffee and breakfast.  | [Slide Deck](https://drive.google.com/file/d/1jMN4OP_eo0HRf3PhJEsWxjjU5kUvkeU9/view?usp=drive_link) |
| Morning *20 minutes*  | **Ice Breaker Activity**Introduce yourself to someone in the room that you do not know and have a conversation with that person about their role in the E-Rate program, discover what challenges they are facing, and their level of comfort and expertise with E-rate. Come back together. The trainers then ask participants what questions they have about E-Rate that would make today worthwhile? Post questions up front. If we do not have the answer today, we will find it for you.  | Walk around activity Post-it notes and chart paper  |
| Morning *15 minutes*  | **Recommended Timeline**Take a few minutes to look at this worksheet individually and reflect on: Which parts could you fill out right away? Which ones would you need help with understanding better? How would having this completed for you and your division assist you in the coming year?  | Independent and Whole Group Activity [Worksheet](https://docs.google.com/spreadsheets/d/1UZrQMuFLaFFf73SnhRGLdL3oJeuTA5yA/edit?usp=drive_link&ouid=112904626800713259080&rtpof=true&sd=true) |
| Morning *20 minutes*  | **At A Glance - Mini case study** Meet Fred Newby. Fred is the new technology director for Never Been County School Division. His division neighbors your school system. You reach out to him to welcome him to the neighborhood, and he asks you what you know about E-Rate. How do you explain to him what you are working on now in the program? Access the *Year At a Glance* document, turn to your table partner and role play with them as Fred about where you are in the E-Rate process now (January 2024), and how he can use this document throughout the year.  | Table Partner Activity [Year At A Glance](https://docs.google.com/spreadsheets/d/1RR0Ixfz6m60GUW_mYQeZc0777Utiq5f8/edit?usp=sharing&ouid=112904626800713259080&rtpof=true&sd=true) |
| Morning *10 minutes (break as needed)* | **Discount Matrix**The trainers will walk participants through the Discount Matrix and explain how the new census data impacts discount levels for Category One and Category Two.  | Whole Group Activity  |
| Morning *10 min.(break as needed)* | **Children’s Internet Protection Act (CIPA)**Review the decision tree to ensure you understand when CIPA compliance is required. What questions do you have about CIPA or demonstrating compliance?* Internet Safety Policy
* Public Notice
* Teaching Internet Safety
* CIPA Audit
 | Independent [Discount Matrix](https://drive.google.com/file/d/1PW_lblY2ftfl0yH2S-nKY4904XQ7FvJQ/view?usp=sharing)Activity[CIPA Decision Tree](https://drive.google.com/file/d/1UrHmQ9Qso1IaTmmTJeWlj0KWIoq0N55B/view?usp=sharing)[Sample filter screenshot](https://drive.google.com/file/d/1GpfTV5Ump-64fNDUFG4AGwNOZWwit1ez/view?usp=sharing) |
| **Scene Change and Break**  |
| Morning 20 minutes *(break as needed)* | **Competitive Bidding - mini case study** You meet Fred Newby for coffee to talk about the E-Rate program and he asks you whether he should use the FCC Form 470 or the mini-bid process for upgrading the backbone of his network in his division. Each table will be given chart paper. Table participants will be asked to draw a line down the middle of the chart page. On one side they will write “FCC Form 470”, on the other side of the chart paper, write “mini bid.” Participants will write in what they know about each of these competitive bidding processes in each column. Participants can use the Resource links to access information. We will report out as a group what we know about each process. This will be a segue into the competitive bidding discussion. (The group reporting out should apply what they’ve collected on the chart paper to give Fred advice about a particular situation he is facing with his backbone upgrade so they can come to the best decision.) | Table Group ActivityWith Chart Paper & Markers[Draft Rubric](https://docs.google.com/document/d/11_Cjis3fn-VJ4DqphOEechwX9Jp-xIDW/edit?usp=sharing&ouid=112904626800713259080&rtpof=true&sd=true)[VDOE E-Rate Web Page](https://www.doe.virginia.gov/programs-services/school-operations-support-services/technology-in-education/e-rate) |
| Morning *15 minutes* *(break as needed)* | **Receiving Competitive Bids**Fred Newby has decided to do an FCC Form 470 which requires a competitive bid. He needs to give instructions to service providers on how bids need to be delivered to the division. *Question for participants*: What do you recommend that Fred Newby do to ensure **bids are secure** and **received on time** from service providers ? Trainers will ask tables to discuss and report out. | Table Discussion  |
| Morning *20 minutes* *(break as needed)* | **Demonstration of FCC Form 470**The trainers will demonstrate how to complete the FCC Form 470 in the E-Rate online portal. The trainers will ask participants what information they think should go in the Form as the trainer completes it.  | Interactive demonstration[FCC Form 470 Filing](https://www.usac.org/e-rate/applicant-process/competitive-bidding/fcc-form-470-filing/) |
| 35 minutes  | **VITA State Master Contracts (Doug Leslie, VITA)** Category One* Internet services
* WAN services
* Bus WiFi ?

Category Two* Internal Connections
* Basic Maintenance of Internal Connections (BMIC)
* Managed Service

Benefits of Using VITA State Master Contracts (saves time, leverages COV purchasing power, rigorous terms and conditions). VITA filed FCC Form 470 #200000187 for Broadband Contracts. VITA filed FCC Form 470 #220000042 for Network Equipment Contracts  | Whole Group Discussion [VITA Contracts for E-Rate Eligible Services](https://www.vita.virginia.gov/procurement/contracts/e-rate/) |
| *20 minutes*  | **Changes in Billed Entity Applicant Reimbursement (BEAR) Invoicing:** * New process inside of the EPC portal
* Check your permission levels

Learn more about how to use the new BEAR invoicing process by going through the USAC training and webinars at your convenience.  | Whole Group Discussion [USAC Upcoming Trainings & Webinars](https://www.usac.org/e-rate/learn/webinars/) |
| **Scene Change and Break**  |
| *15 minutes*  | **What Is Your Back-up Plan for E-Rate?*** What if the E-Rate Point of Contact (POC) leaves the division?
* What if there is a family emergency?
* What if you go on vacation (a REAL vacation)?
* What if the POC is sick or out for an extended period of time?

Participants will discuss strategies at their table and get feedback from other divisions about what they do for back-up.  | Table Discussion [Worksheet](https://docs.google.com/spreadsheets/d/1UZrQMuFLaFFf73SnhRGLdL3oJeuTA5yA/edit?usp=drive_link&ouid=112904626800713259080&rtpof=true&sd=true) |
| *15 minutes*  | **Who Should Be on Your E-Rate Team and Why?**You tell Fred Newby how many functions around E-rate require cooperation with other school division peers. Who would you recommend to Fred to include in his division’s E-rate team and why? Think ahead about what you can do between now and the FY 2025 program year to create an E-Rate team. Where do you start? How do you gain support?  | Independent Activity (index cards, markers to list out the people )  |
| *10 minutes* | **Category Two Planning Worksheet**Category Two Worksheet may be embedded in the mini-bid.  | Interactive Demonstration of how to embed the [Worksheet](https://docs.google.com/spreadsheets/d/1UZrQMuFLaFFf73SnhRGLdL3oJeuTA5yA/edit#gid=2139809036)[Sample Mini-bid](https://docs.google.com/document/d/1FRYKeAmunqaLBGuKa0W7SWy8UaTxPylz/edit?usp=sharing&ouid=112904626800713259080&rtpof=true&sd=true) |
| *15 minutes*  | **Cabling Checklist- mini case study** Fred Newby shares that he’s ready to upgrade the network backbone in the division’s central office, which also serves as their network center for the division. He’s contacted some vendors for quotes, but found the process overwhelming. It’s been years since he’s done any purchasing and his last gig was a one-building school division in Wisconsin that ran on Cat-3 cabling and consumer-grade network switches that had been sourced from Best Buy. What guidance do you give Fred on a cabling project? Use the cabling checklist to go through the questions you need to ask in preparation for a cabling project.  | Table Partner Activity, Inquiry of Questions in Checklist [Cabling Checklist](https://docs.google.com/document/d/1Vmr4zt4KA0acbFf-UXnwqPTv8NDKkhAI/edit?usp=sharing&ouid=112904626800713259080&rtpof=true&sd=true)[VITA state master contracts for cabling](https://www.vita.virginia.gov/procurement/contracts/e-rate/)  |
| *10 minutes* | **Category Two Equipment*** Labeling Equipment
* Non-instructional Facilities(NIF) do not qualify
* Equipment must remain in use for 3 years
* Equipment must be inventoried for 5 years
	+ May be moved to NIF
	+ May trade in
	+ May give away
	+ May discard
	+ May sell
 | Whole Group Discussion [Sample label](https://drive.google.com/file/d/1jLZcFyoXvsp9EO60asc-XgNzhRJN4k5A/view?usp=sharing) |
| *20 minutes*  | **FCC Form 486 & FCC Form 500*** 486 - CIPA & the “thank you” note
* 500 - Change in dates; reduction in amount funded; cancellations
	+ Revert unused funds from 2021-2022 & 2022-2023

Learn more about the FCC Form 500 by accessing the Form 500 Filing instructions.  | Interactive Demonstration[Form 500 Filing](https://www.usac.org/e-rate/applicant-process/before-youre-done/fcc-form-500-filing/) |
| **Scene Change + Break** |
| *15 minutes*  | **Category Two 5-Year Budget*** July 1, 2021- June 30, 2026
* Will not rollover beyond the 5-yr period
* You are planning for Yr 4, 2024-2025
* Your budget may go up, but not down
* Recommend replacing old cabling if you are not at 6A cabling (if funds are left over)

Participants will be given several minutes to take a deeper dive into Category Two Budgets by visiting the Category Two Budget Information web page.  | Independent Activity [Category Two Budget Information](https://www.usac.org/e-rate/applicant-process/applying-for-discounts/category-two-budget/)  |
| *20 minutes*  | **WiFi on Buses*** Are you considering WiFi on buses?
* Pros?
* Cons?
* Has any school division implemented Wi-Fi on school buses? Experiences?
 | Whole Group Discussion  |
| *10 minutes*  | **Archiving Files / Recommended Folder Organization**Participants will learn how to organize their E-Rate files for documentation purposes and in the event of an audit. * Required to archive documents for 10-years
 | Whole Group Discussion [Sample structure](https://drive.google.com/file/d/10r2XQw-iODoAUYVfuxwNECIFk7Btue0o/view?usp=sharing) |
| *20 minutes* | **Broadband and Network Infrastructure Updates** Broadband Equity and Access Deployment (BEAD; the) goal is all Virginian’s connected to broadband by 2028. Annual Student Record Collection- VDOE required under S.B.724 to collect Internet and computing device data from school divisions through the annual Student Record Collection (SRC) School divisions should be developing a Wi-Fi map for the school community in the event of a school closing. School divisions should be collaborating with their local government on any broadband initiatives that benefit the community.  | Whole Group Discussion [Commonwealth Connect, 5-Year Plan](https://www.dhcd.virginia.gov/sites/default/files/Docx/vati/virginia-bead-5-year-plan.pdf) [Senate Bill 724](https://lis.virginia.gov/cgi-bin/legp604.exe?221+ful+SB724)[Broadband Mapping](https://commonwealth-connection.com/) |
| *15 minutes*  | **What Should You Be Doing Now in E-Rate?**For repetition, participants will access the Year at a Glance document for further review and to refresh their memory.Trainers will ask 2-3 school divisions to share what they are doing currently with E-Rate.  * Don’t forget to place anticipated Board items on your division’s Board of Education future agenda !
 | Independent and Share Out Activity [Year at a Glance](https://docs.google.com/spreadsheets/d/1RR0Ixfz6m60GUW_mYQeZc0777Utiq5f8/edit?usp=sharing&ouid=112904626800713259080&rtpof=true&sd=true) |
|  | **Closure and Reflections**End of day business is addressed. Participants and trainers will reflect on the training for the day and the most significant learnings for the day. Please complete the survey to provide feedback on the training.  | Independent Activity [Survey](https://docs.google.com/document/d/1alEUC9AL2hWoXAkrDU8GW-QTurImyQOv/edit?usp=drive_link&ouid=112904626800713259080&rtpof=true&sd=true) |