E-Rate Program: Overview

Presented by: **E-Rate Advantage, LLC**

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Agenda

- ▶ E-Rate Overview

- ▶ Updates for 2026

- ▶ School Requirements

- ▶ The Application Process

- ▶ New Schools, Start Up Schools

- ▶ E-Rate Advantage

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E-Rate Overview

Sponsored by the FCC

Managed by USAC

Application Review by Maximus

1998 - $2.25B

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Who is Eligible?

Schools and Libraries with an Endowment Under $50M

K-12

Head Start/Pre-K (ages 3-5)
*only available in certain states

Must Have a Building – Home-Based Not Eligible

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Discount Rate

Schools & libraries discount matrix	Category One		Category Two	
% of students in your school that qualify for the National School Lunch Program is…	**Discount Level**		**Discount Level**	
	Urban Discount	**Rural Discount**	**Urban Discount**	**Rural Discount**
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	90%	85%	85%

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Category 1

▶ Internet Access

  – Broadband Over Power Lines
  – Cable Modem
  – DSL
  – T-1, T-3

  – Ethernet
  – Lit Fiber
  – MPLS
  – Satellite Services

▶ Bus Wifi and Wi-Fi Hot Spots (no longer)

▶ No Budget

  ▶ Example:

    ▶ $1,000 a Month Internet * 12 months = $12,000 a year ($12,000*.9 = $10,800)

    ▶ $10,800 Discounted

    ▶ $1,200 Undiscounted

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Category 2

▶ **Network Equipment**
- Routers
- Switching
- Wireless Access Points
- Cabling
- Racks - For Eligible Equipment

- Controllers
- Basic Firewalls/Services
- UPS's - For Eligible Equipment
- Software – For Eligible Equipment
- Caching Servers/Services

▶ **Basic Maintenance of Network Equipment (BMIC)**

▶ **Managed Internal Broadband Services (MIBS)**

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Category 2 Funding Budget

$201.57 Per Student: PRE-DISCOUNT for Schools

5-Year Budget: 2026-2030

Example:

- If you are a school with 1,000 students and your school qualifies for an 80% E-Rate discount you would get $161,256 in Category 2 funding for a 5-year period
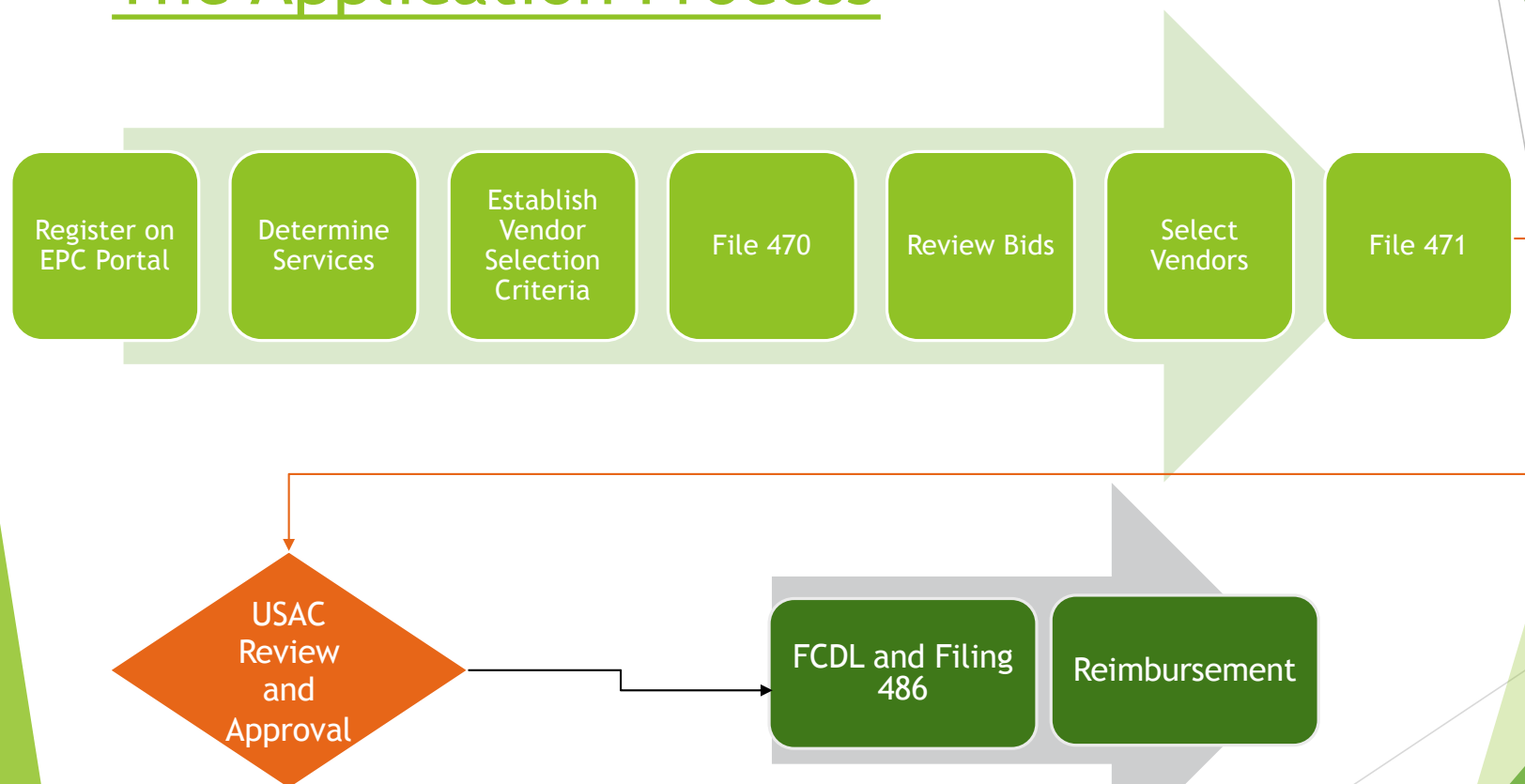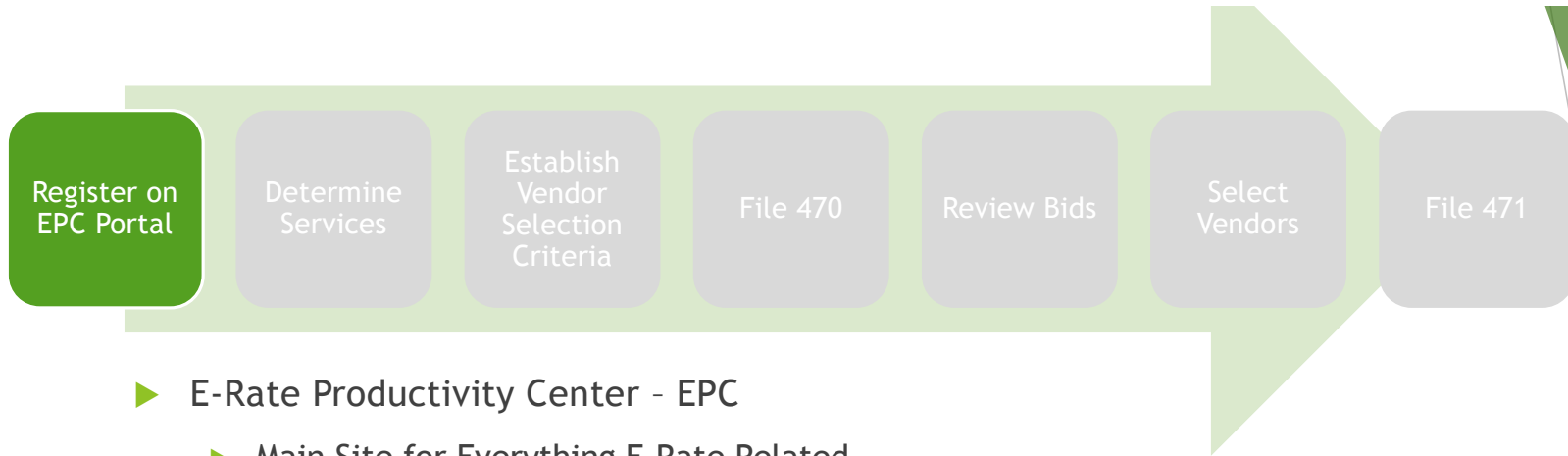 - (1,000 * 201.57= $201,570 * .8 = $161,256)

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Updates for 2026

- ▶ Wi-Fi on School Buses
- ▶ Wi-Fi Hot Spots

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School Requirements

- Children's Internet Protection Act (CIPA) Policy:
  - Internet Safety Policy, Technology Protection Measure, and Public Notice
- Discount Validation:
  - Every Student Counts
- Document Retention
  - 10 years

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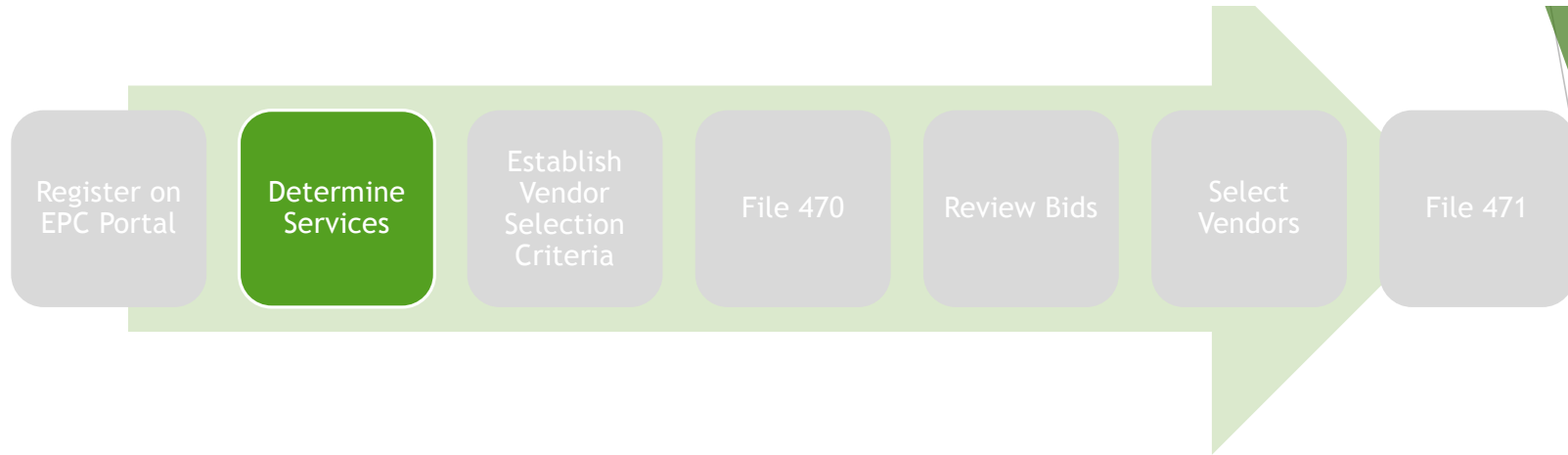# The Application Process

Register on EPC Portal → Determine Services → Establish Vendor Selection Criteria → File 470 → Review Bids → Select Vendors → File 471

USAC Review and Approval → FCDL and Filing 486 → Reimbursement

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11

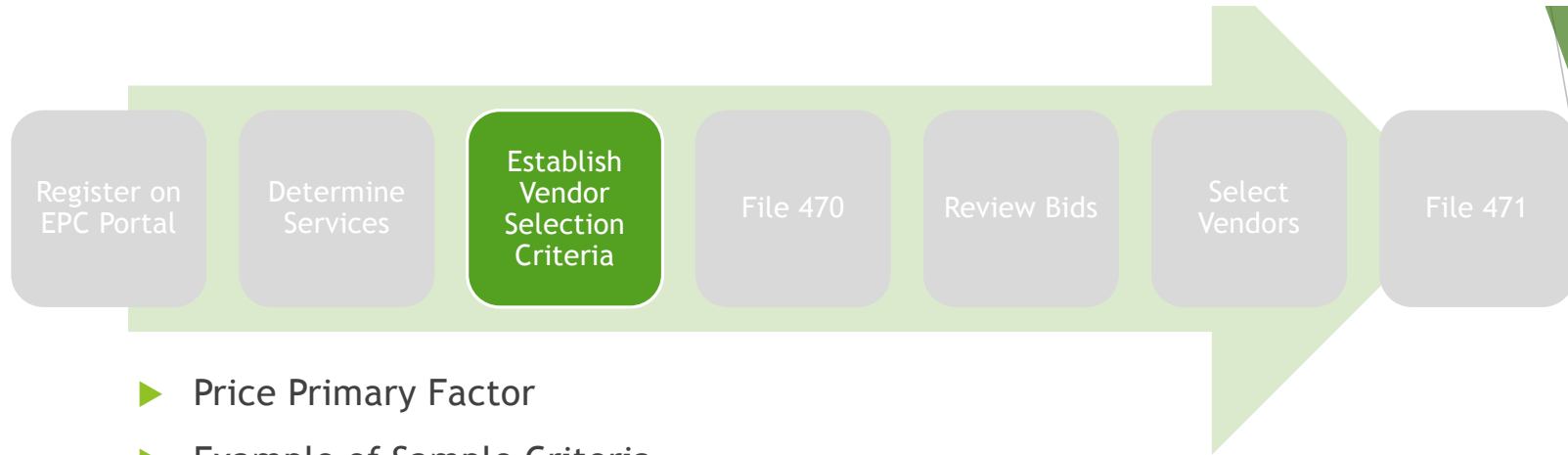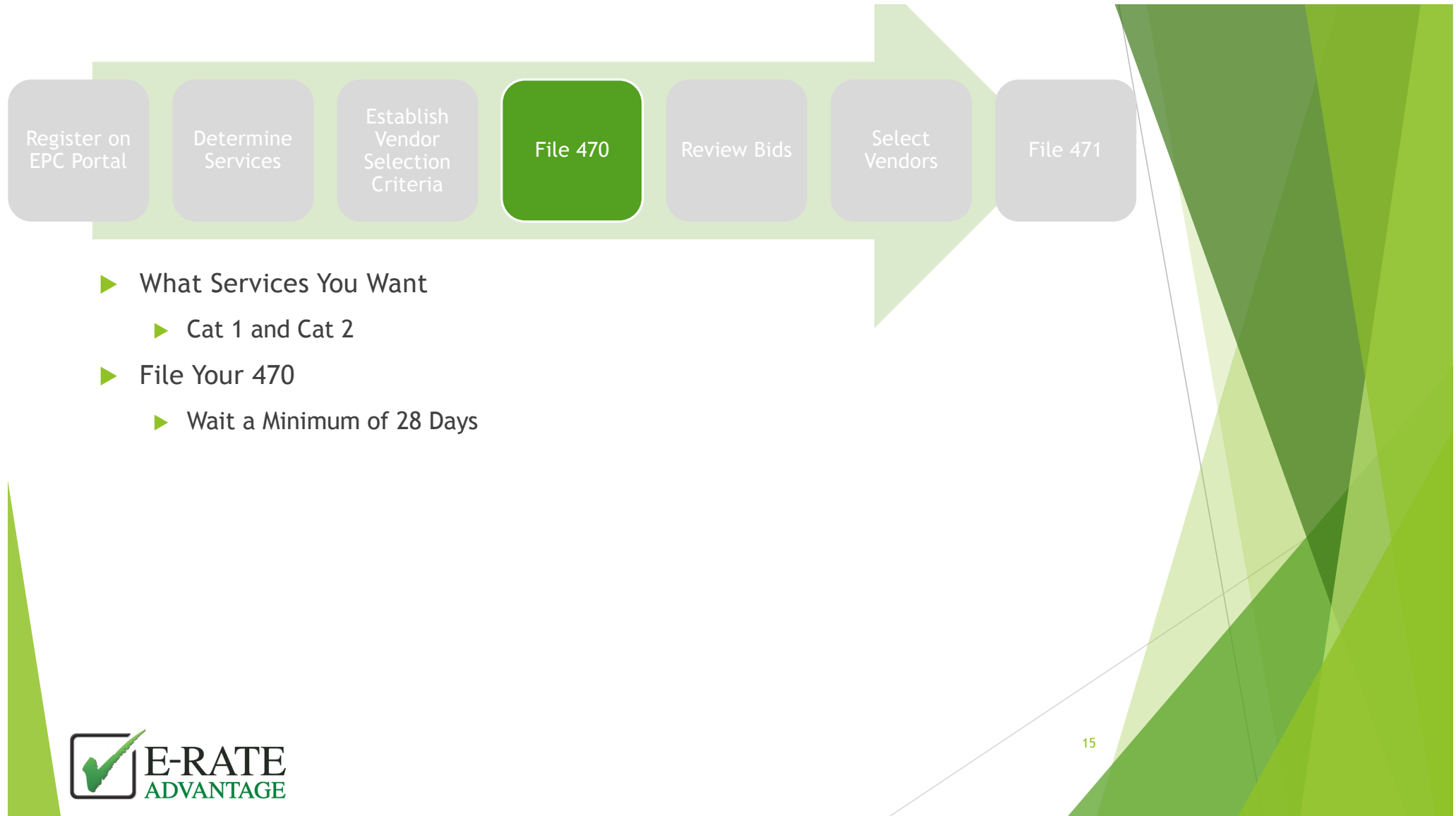| Register on EPC Portal | Determine Services | Establish Vendor Selection Criteria | File 470 | Review Bids | Select Vendors | File 471 |

- ▶ E-Rate Productivity Center – EPC
  - ▶ Main Site for Everything E-Rate Related
  - ▶ Every Person Involved With E-Rate Must Have a Log In
  - ▶ Usernames are E-Mail Specific
  - ▶ https://portal.usac.org/suite/
  - ▶ For Help With EPC 1-888-203-8100

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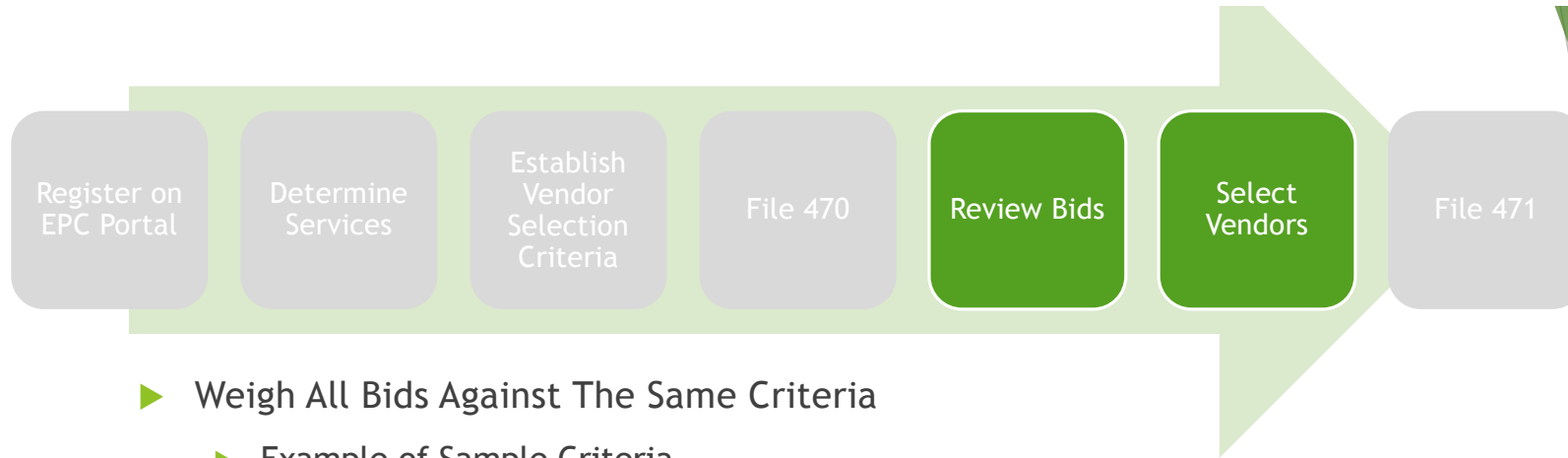| Register on EPC Portal	Determine Services	Establish Vendor Selection Criteria	File 470	Review Bids	Select Vendors	File 471

- ▶ What Services Do You need For The Next E-Rate Year (July 1 to June 30)
  - ▶ Cat 1???
  - ▶ Cat 2???
- ▶ Apply NOW!

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13

| Register on EPC Portal | Determine Services | **Establish Vendor Selection Criteria** | File 470 | Review Bids | Select Vendors | File 471 |

- ▶ Price Primary Factor
- ▶ Example of Sample Criteria
  - ▶ Price – 40%
  - ▶ Experience with School – 20%
  - ▶ Experience with E-Rate – 20%
  - ▶ References – 20%

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Register on EPC Portal	Determine Services	Establish Vendor Selection Criteria	File 470	Review Bids	Select Vendors	File 471

- ▶ What Services You Want
  - ▶ Cat 1 and Cat 2
- ▶ File Your 470
  - ▶ Wait a Minimum of 28 Days

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| Register on EPC Portal | Determine Services | Establish Vendor Selection Criteria | File 470 | Review Bids | Select Vendors | File 471 |

▶ Weigh All Bids Against The Same Criteria

  ▶ Example of Sample Criteria

    ▶ Price – 40%

    ▶ Experience with School – 20%

   ▶ Experience with E-Rate – 20%

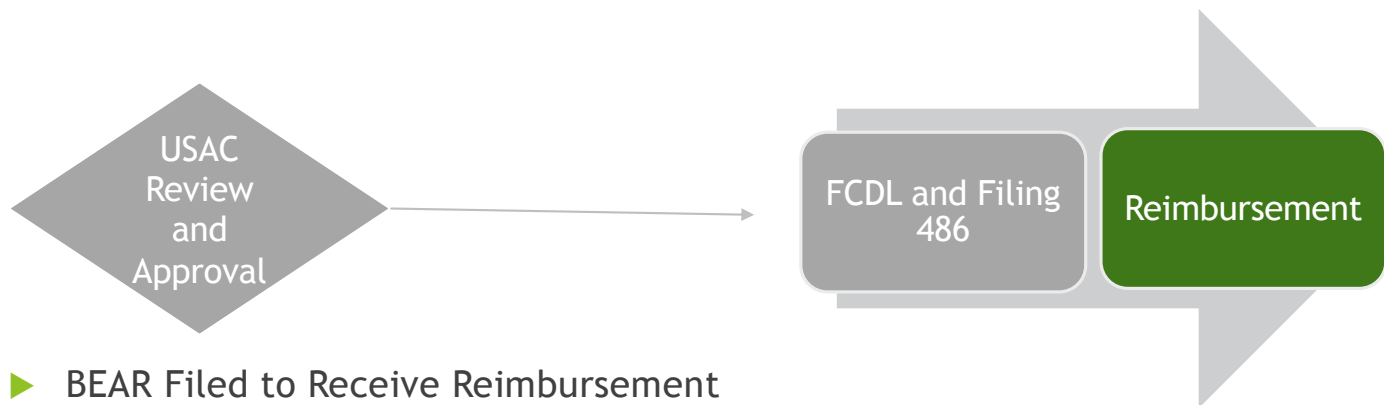   ▶ References – 20%

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| Register on EPC Portal | Determine Services | Establish Vendor Selection Criteria | File 470 | Review Bids | Select Vendors | File 471 |

- ▶ Who You Select
- ▶ Services
- ▶ Pricing
- ▶ Term

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USAC Review and Approval

FCDL and Filing 486

Reimbursement
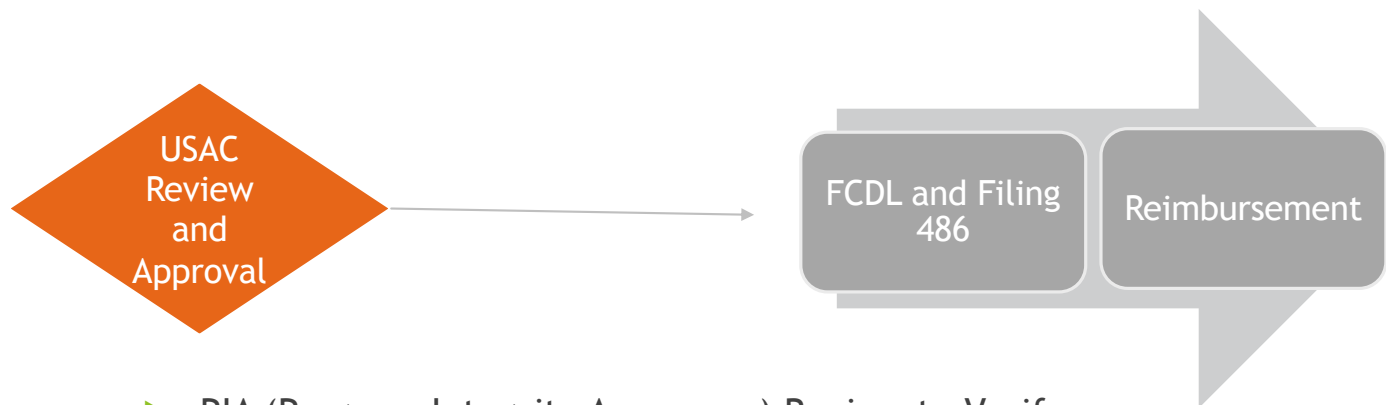
- ► PIA (Program Integrity Assurance) Review to Verify:
    - ► School Proof
    - ► Student Count/NSLP
    - ► Copies on Bills/Contracts
- ► Special Compliance Reviews to Verify:
    - ► Vendor Selection Process
    - ► Cost Effectiveness
- ► Audits

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USAC Review and Approval → FCDL and Filing 486 | Reimbursement
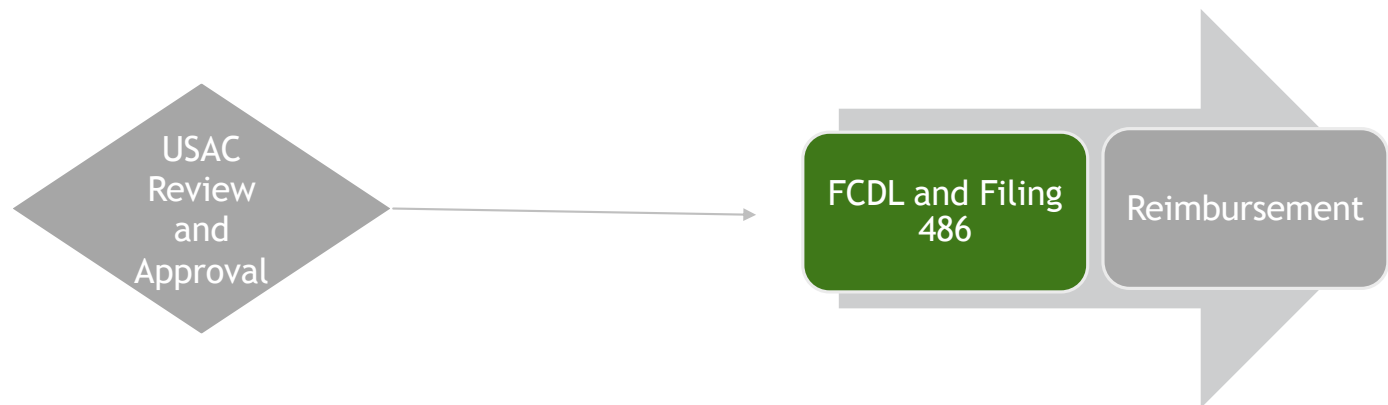
- ▶ Funding Commitment Decision Letter (FCDL) Received
  - ▶ Official Approval Letter
- ▶ 486 Filed to Confirm:
  - ▶ Services Have Started
  - ▶ CIPA Compliance

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│   USAC   │                    │  FCDL and    │              │
│  Review  │ ─────────────────▶ │  Filing 486  │ Reimbursement│
│   and    │                    │              │              │
│ Approval │                    └──────────────┴──────────────┘
└──────────┘
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▶ BEAR Filed to Receive Reimbursement

  ▶ Billed Entity Applicant Reimbursement

▶ SPI Setup to Receive Direct Discounts on Bills

  ▶ Service Provider Invoicing

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New Schools and Start Up Schools

▶ Same Process

- Get Setup in EPC

- Determine What Services You Need

- Establish Your Vendor Selection Criteria

- File Your 470

- Review Your Bids

- Select Your Vendors

- And File Your 471

▶ Estimates/Best Guesses

21

- ▶ Established in 2005

- ▶ Over 500 Clients Nationwide

- ▶ Member of The Florida Consortium of Public Charter Schools

- ▶ Member of E-Rate Management Professionals Association

E-Rate Advantage

- Consult With The School Regarding E-Rate Needs

- Plan E-Rate Application

- File All E-Rate Forms

- Serve As The Single Point of Contact With USAC

- Work With USAC On PIA Reviews, Selective Reviews, Audits, etc.

- Provide The School With a Funding Commitment Decision Letter From USAC.

- We Charge No Fee Until The Application is Approved

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Our Services

More info and Resources

- ▶ Please See Our Website: www.erateadvantage.com
- ▶ Please Visit The USAC Website: https://www.usac.org/sl/
- ▶ Please Review The Eligible Services List: https://www.usac.org/e-rate/applicant-process/before-you-begin/eligible-services-list/
- ▶ USAC Customer Service – 1-888-203-8100

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24

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Questions?

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