Simplifying E-rate Documentation to Connect Learners and Educators

How schools and libraries can use cloud-based management technology to ensure successful E-rate applications

Now more than ever, technology plays a pivotal role in education. The COVID-19 pandemic has amplified the need for learners and instructors to access digital services quickly and dependably. But unreliable wireless networks, limited network bandwidth and other technical deficiencies can impact a student's academic success.

One way that schools and other educational institutions can ensure students have the resources they need is through the Schools and Libraries Program, also known as the E-rate Program. Established in 1996 by the Federal Communications Commission (FCC) and administered by the Universal Service Administrative Company (USAC), the E-rate Program offers schools and libraries discounts on telecommunications services and products. USAC administers discounts based on the level of poverty in the institution's surrounding area, and whether that area is urban or rural. Some schools and libraries can receive up to a 90 percent discount on services.

E-rate's funding is critical to many organizations. "These discounts enable schools and libraries to afford technology they probably wouldn't be able to afford otherwise," says Rebecca Martin, state coordinator and E-rate specialist for the North Carolina Department of Public Instruction.

Despite the program's value, the E-rate application process can be daunting for library and school staff. Applicants must submit extensive amounts of paperwork and E-rate beneficiaries must also maintain documentation for more than 10 years in case of an audit by USAC. This is particularly challenging for large school or library districts that have to provide information on dozens of locations.

"With all of the E-rate documentation requirements, it is important to be as organized as possible," says Kevin Nelson, senior network systems engineer for the San Joaquin Valley Library System.

Schools and libraries need to establish a system to manage the application process and store documentation. Otherwise, institutions risk either being denied funding or asked to return funds. This is more important than ever before as the 2021 COVID-19 relief package (formally known as the American Rescue Plan Act of 2021), signed into law in March, expanded the E-rate program by roughly $7.2 billion.

By utilizing the right technologies and relying on the right people for support, schools and libraries can take full advantage of the program, earning the greatest discounts to support their learners.

CENTRALIZING AND MANAGING DOCUMENTATION

One of the most intimidating elements of the E-rate Program is the amount of documentation applicants must gather and maintain. School and library staff often struggle to find important information because it is scattered across various systems, including Google Drive, local hard drives, servers and paper files.

As Martin explains, "Those who are really successful in either an E-rate application or an audit have all of their files together. They know what they need to keep, and how to quickly retrieve it."

A cloud management system allows organizations to store information on

a centralized platform. Cloud-based systems are ideal for managing E-rate documentation because they can be accessed by multiple people. If there is staff turnover at a school or library, new employees can easily find and open all documentation. If staff employ a consultant to assist with the application process, the consultant can easily view all the necessary paperwork.

"A cloud-based E-rate management system allows schools and libraries to have more continuity within their organizations," says Beverly Sutherland, president and CEO of EdTechnologyFunds, Inc. "Organizations can add and disable users as needed."

Cloud-based systems are also secure. Files are encrypted, ensuring that only the people allowed to access a document can do so.

With a cloud management system, schools and libraries also save on capital costs. Staff do not have to purchase and maintain any additional servers or network hardware to run a cloud-based program. They can also get the system up and running quickly, especially now with many staff members working remotely as a result of COVID-19-related closures or partial openings.

While schools and libraries could use a generic cloud storage system such as Google Drive, there are many benefits to using a system specific to E-rate. Cloud-based E-rate management software is designed with the complex E-rate application in mind.

For example, some E-rate management software stores documents by funding year and E-rate category, allowing for quick and easy access to materials. Users can import materials from USAC's database, hard drives, other cloud drives and more to combine their documentation on one system.

The San Joaquin Valley Library System uses a cloud-based management system to keep track of E-rate documentation for its district, which includes 10 jurisdictions with 108 libraries.

"Cloud storage technology is the best way to stay organized," says Nelson. "It gives us a clearinghouse of documentation. Employees do not have to dig through files and cabinets. All of our documents are in one, easy-to-access place."

ASSEMBLING A TEAM

Along with having a document management system to make the application process run smoothly, schools and libraries also need to engage the right people for support.

Institutions should identify an internal team to manage the multifaceted process of documentation and ensure they can apply to the E-rate Program every year, even when a staff member leaves or retires.

The E-rate team should be a mix of IT experts who understand the technologies being purchased, and administrators like superintendents or accounting personnel who can speak to the financial value of the program.

E-rate applicants might also consider hiring an E-rate consultant to help organize and process their application. Schools and libraries should turn to consultants with expertise in filing E-rate applications for their specific kind of institution.

Erick Miseroy, IT coordinator at the Port of Los Angeles High School, says a consultant can keep schools and libraries up to date with the latest changes to E-rate rules and regulations. "My consultant is instrumental in making sure what I am doing fits within the constraints of E-rate," he says. I don't have time to keep current on every change or policy adjustment. My E-rate consultant makes sure I have the information I need to support my school."

By using a cloud-based management system, E-rate teams can easily share documents and information with one another as well as any consultants, making for a more streamlined application process.

ACHIEVING DIGITAL EQUITY

The process of applying for E-rate can feel overwhelming. But schools and libraries shouldn't let the complexity of the application process deter them. E-rate helps institutions move closer toward closing the digital divide between learners with consistent access to internet and other technologies, and those without.

Nelson describes the benefits of the program to the patrons of San Joaquin Valley Library System. "We are located in a very rural area with limited internet access. E-rate allows us to serve our patrons and give them better services. The process might be complex, but the benefit to the community is enormous."

With an organized system, educational institutions can move one step closer to ensuring all citizens have access to the technologies they need.

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