



**ALASBO**  
**Hotel Captain Cook**  
**Dec. 7-8 2014**

**E-rate and Your District**

The Telecommunications Act established the Universal Service Fund in 1996. Money started flowing out of this fund in 1998 and the money that went to schools and libraries became known as E-rate, short for the Education Rate that those agencies paid as the result of this funding support.

The Universal Service Administrative Company, a not for profit business, was established to administer this money. It is commonly called USAC. The link to that site was: <http://www.universalservice.org/sl/>

There is an annual filing window for applying for E-rate funds, and this year it opens in early January and closes in late March.

Those things that may be applied for can be found in the Eligible Services List, or ESL <http://www.universalservice.org/sl/> From the left hand menu, select Eligible Services List

**Roles that you may play:**

- **Form Certification:**  
E-rate's 3 forms require someone in the district with financial authority to certify the prepared forms. It is common for the technology coordinator to prepare the forms and then ask the administrative assistant, business officer, or superintendent to certify the forms. The certifications on the forms are not to be taken lightly and should be read and understood. The certifier is signing on behalf of the district and it is the district that will be financially accountable in an audit. The business officer should be familiar with these certifications, even if they are not the ones actually certifying because they are the standard that your agency is held to.
- **Document Retention:**  
E-rate requires that ALL forms, (including reimbursement checks, bills, applications, technology planning, CIPA requirements, vendor selection, contracts, etc.) be retained for a MINIMUM of 10 years from the last date to receive service. This is a federal requirement and one of the certifications that your district makes when submitting the Form 471 when applying for funds. You MAY keep documentation electronically. As the business officer, you should take the lead in document retention.
- **Student Eligibility Data Collection/Reporting:**  
E-Rate discounts are individual to a district and are based upon the measured poverty level of a district's enrollment. While the standard way of determining poverty is the National School Lunch Program (NSLP) data collection, many Alaska districts use the Survey method as an alternative means of determining the poverty level of a school community. Regardless of your means of determining poverty, one of the certifications your district makes is that you will retain clear and accessible records that support your reported poverty level. As the business officer, it should fall to you to make sure that this poverty information is included in your E-rate paperwork each year and is readily available in the event of an audit. Your school may alternately determine its eligibility via receiving state certification in the Community Eligibility Provision program of Student Nutrition Services.

- **Communication within the District:**

Many individuals within a district may touch the E-rate process. You may only play a supporting role....OR you may play the lead role. Regardless of the structure of your district's E-rate process, you should be aware of the steps involved, stay on top of the timeline, send reminders to those who have a supporting part to play and, in general, ensure that this funding is appropriately applied for in a timely way.

I encourage all business officers to be a part of the State of Alaska EED E-rate list serve, which broadcasts reminders and program updates. To request membership to this list serve you will e-mail Valerie Oliver at [valerie.oliver@alaska.gov](mailto:valerie.oliver@alaska.gov)

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