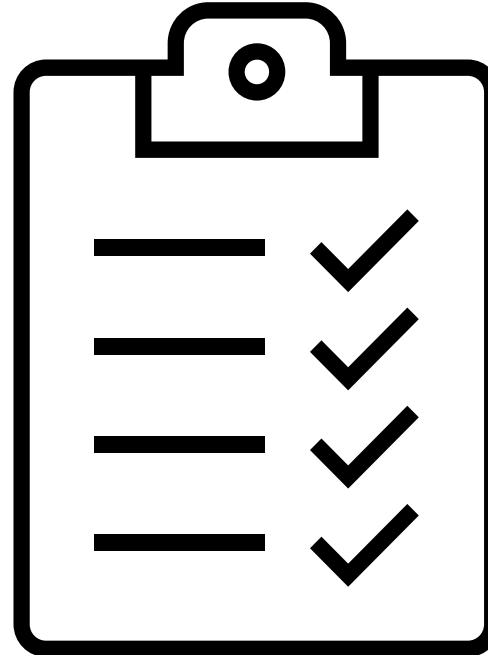


Tribal Library E-Rate Advocacy Program (T-LEAP) and E-Rate

December 17, 2025

Agenda

- Introductions & Welcome
- E-Rate Overview
- E-Rate Program Cycle
- Tribal Library E-Rate Advocacy Program (T-LEAP)
- Resources



Introductions and Welcome

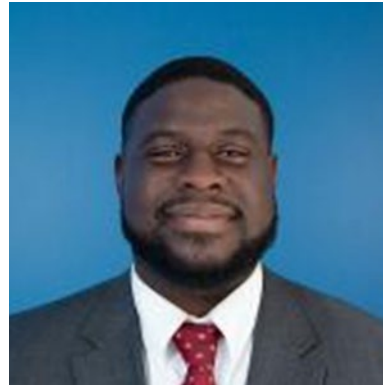


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Gem's role is to provide clear, accurate, real-time support to Tribal stakeholders.

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Nancy's role is to provide guidance to Tribal library applicants throughout the E-Rate application process.

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Who We Are: The Universal Service Administrative Company

The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of the USF and its four programs.

- **The Universal Service Fund (USF):** Exists to ensure that all people in the United States have access to quality, affordable connectivity service.



Lifeline Program

Discounted phone and internet service to eligible low-income consumers.



High Cost Program

Reduced rates for telecom and broadband services in eligible high-cost areas.



E-Rate Program

Funding for broadband services in eligible schools and libraries.

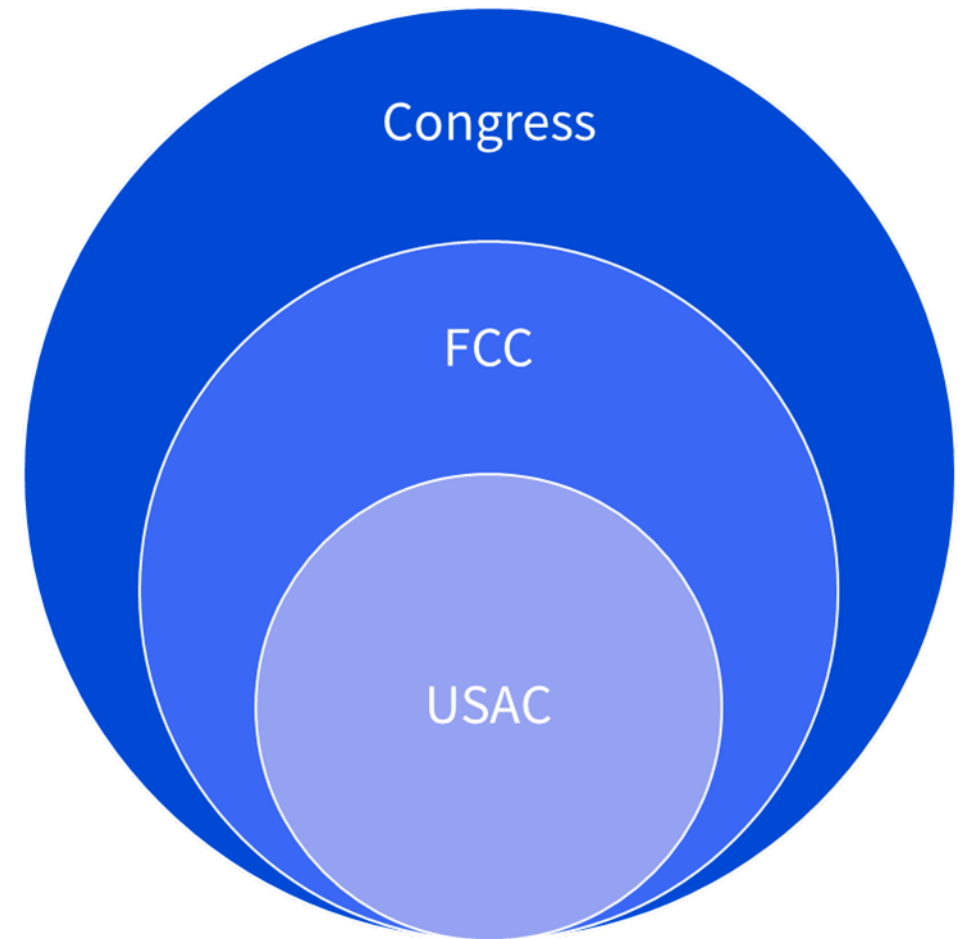


Rural Health Care Program

Funding for telecom and broadband services for eligible rural health care providers.

Who Makes The Rules?

- Congress enacted the Telecommunications Act of 1996, which directed the FCC to establish the E-Rate program and the other USF programs.
- The FCC sets rules and policies for the program and gives direction to USAC.
- USAC is responsible for the day-to-day administration of the E-Rate program.



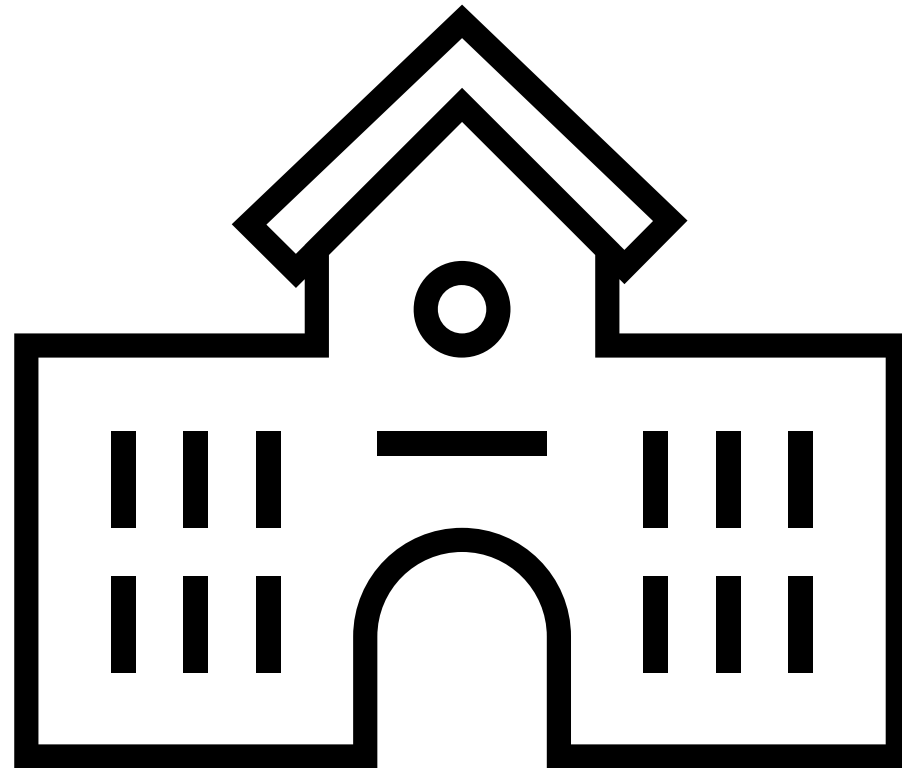
Glossary

Acronym	Definition
FCC	Federal Communications Commission
EPC	E-Rate Productivity Center
NSLP	National School Lunch Program
RFP	Request for Proposal
FCDL	Funding Commitment Decision Letter
T-LEAP	Tribal Library E-Rate Advocacy Program
TLA	Tribal Library Advocate
BEN	Billed Entity Number
C1	Category One Services
C2	Category Two Services

What is E-Rate?

What is E-Rate?

- The E-Rate program provides support to schools and libraries across the nation to obtain affordable, high-speed broadband services and internal connections to connect students and library patrons with learning opportunities and services.



Why Participate in E-Rate?

- The E-Rate program provides **discounts of up to 90 percent** to eligible schools (K-12), libraries, and groups of schools and libraries (e.g., consortia, districts, systems) for eligible internet access, data transmission services, and internal connections (e.g., Wi-Fi equipment, cabling, and basic maintenance services) that are competitively bid and approved on the application (FCC Form 471).
- These discounts result in a reduction in the costs of the equipment and services to the schools or libraries requesting funding through the E-Rate program.

E-Rate Program Overview

- Eligible Applicants
 - Public and private (K-12) schools, libraries, and groups of schools and libraries (e.g., consortia, school districts, library systems), as well as Tribal schools, Tribal libraries, and Tribal college and university (TCU) libraries that also service as a public library.
- Eligible Services
 - Schools and libraries are eligible for discounts between 20 and 90 percent of the costs of eligible equipment and services. The applicant pays the remaining share (e.g., a 90 percent applicant pays \$100 on a \$1,000 request).
 - Discount varies based on the school or library's level of poverty, urban/rural status, and the type of services.

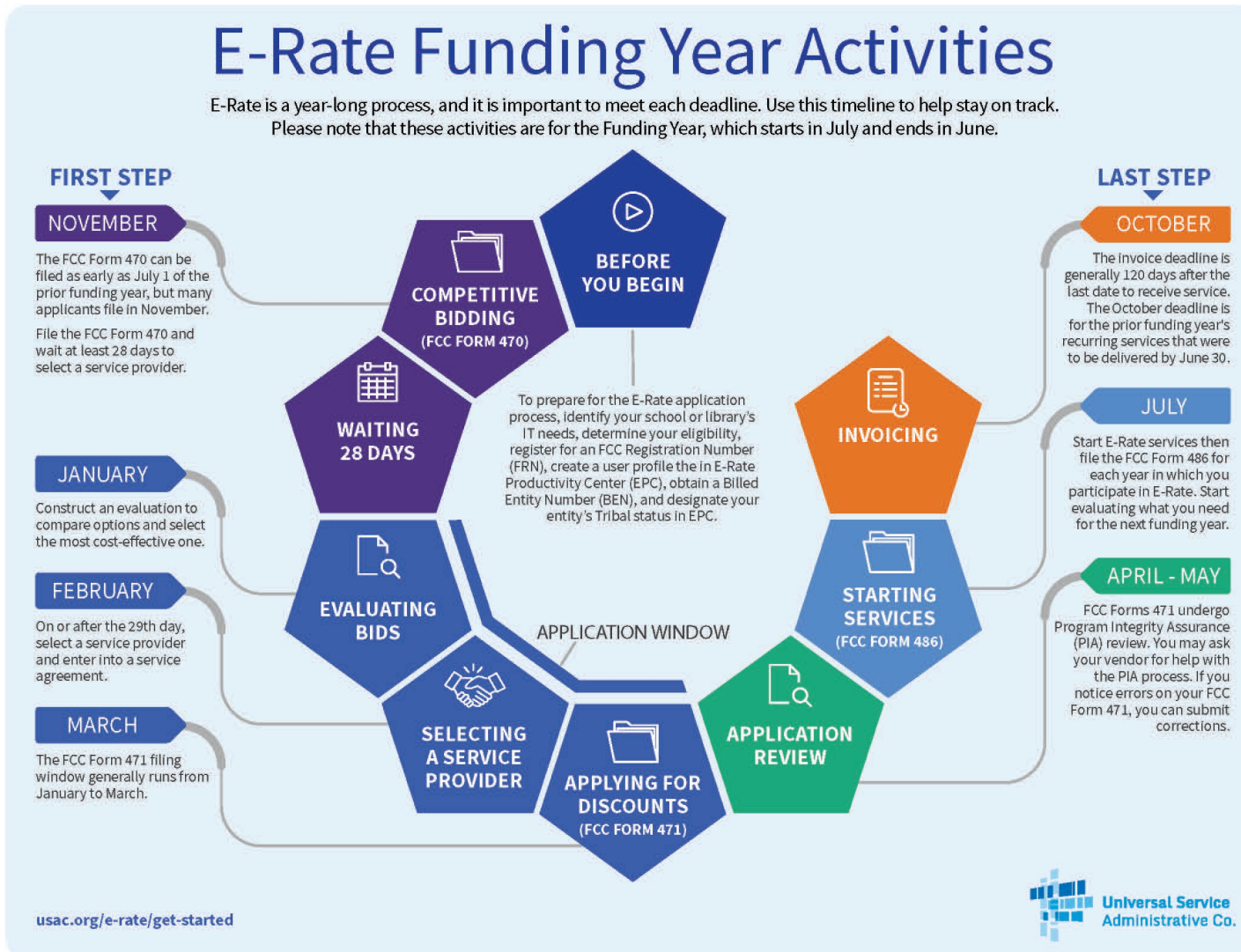
E-Rate Program Overview (Continued)

- Eligible Services Continued
 - Category One (C1) are services that support connectivity to schools and libraries.
 - Data transmission and/or internet access
 - Bus Wi-Fi
 - Off-premises Wi-Fi hotspots
 - Category Two (C2) are services that support connectivity within schools and libraries.
 - Internal connections (e.g., routers, cabling, routers, or other equipment needed for a Wi-Fi network)
 - Managed Internal Broadband Services (MIBS)
 - Basic Maintenance of Internal Connections (BMIC)
 - See [Category Two Budgets](#) page
- Please visit the [Eligible Services List](#) page to learn more about eligible equipment and/or services.

Questions?

E-Rate Program Cycle

Application – Funding Year Activities



Applicant Forms and Important FY2025 Dates

Competitive Bidding

September 19, 2024 – February 2025*



Apply for Discounts

January 2025 – March 2025*



Start Services

July 1, 2025 – June 30, 2026



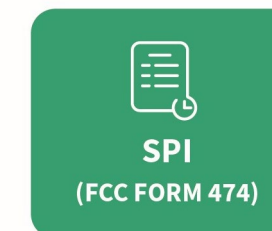
Invoice USAC

Recurring Services
July 2025 – October 2026*

Non-recurring Services
July 2025
– January 2027*



OR



* Date ranges reflect a typical timeline but are subject to change.

Before you Begin

Before You Begin: New Schools and Libraries

Follow the steps below to prepare your E-Rate program application:

1. Obtain an [FCC Registration Number](#).
2. Obtain a [Billed Entity Number \(BEN\)](#) and create a user profile in the [E-Rate Productivity Center \(EPC\)](#).

Special Information for Tribal Governments

- A Tribal government can create a consortium for its Tribally-controlled schools and libraries, and a Tribal government employee can act as the consortium leader. The consortium as an entity is not eligible for discounted services, but they can run competitive bidding processes and/or apply for discounted services on behalf of their eligible member entities. Any schools or libraries can come together to form a consortium.

Before You Begin: EPC Administrative Window

The EPC Administrative Window is the period during which applicants can make updates to their profile information in EPC to prepare for the upcoming FCC Form 471 application filing window. During the administrative window, applicants can update their student counts, National School Lunch Program (NSLP) participation rates, contact information, and request a C2 Budget recalculation.

- **First-time Filers**

- If you are new to the E-Rate program, you will need a user account in the E-Rate Productivity Center (EPC) .
- For security purposes, you will also need a login and password for One Portal, our multi-factor authentication security system.
- If you are new to the program, contact our Customer Service Center (CSC) at (888) 203-8100. The CSC can help you set up your organization's EPC profile and your Account Administrator.

The administrative window **opened October 15 and will close in January**. The administrative window closes – and the applicant profiles are locked – shortly before the FCC Form 471 application filing window opens in January.

Document Retention

- **Applicants and service providers** are required to [retain documentation](#) that demonstrates compliance with the statutory or regulatory requirements for all E-Rate program purchases of equipment and services **for a period of 10 years** after the latter of the last day of the applicable funding year or the service delivery deadline for the funding request.
- Winning **service providers** must retain records related to the purchase and delivery of E-Rate eligible equipment, signed and executed contracts, bidding information, invoices, provision of services, and other matters relating to equipment and services.
- For example, for **recurring internet access service** for FY2025, both the **applicant and the service provider** must retain all records until **at least** June 30, 2036.

Tribal Entities

- In 2022, the FCC amended its E-Rate rules to include Tribal libraries in its definition of library and clarify that Tribal libraries are eligible for support.
- In 2023, the FCC further amended its E-Rate rules to make Tribal College or University (TCU) libraries eligible for support.
- A library may be designated as a Tribal library by a Tribal Government (e.g., pursuant to a Tribal Resolution).
- A Tribal library may also work with the state library administrative agency where it is located.
- Tribal libraries should demonstrate three characteristics commonly associated with Institute of Museum and Library Services (IMLS) grants to Native American libraries:
 - Regularly scheduled hours
 - Staff
 - Materials available for library users

Tribal Entity Definition

- The definition was updated for FY2024 in the [FCC 23-56](#) and the Federal Register:
 - An entity is “Tribal” for purposes of E-Rate funding if it is a school operated by or receiving funding from the Bureau of Indian Education (BIE), or
 - If it is a school or library operated by any Tribe, Band, Nation, or other organized group or community, including any Alaska native village, regional corporation, or village corporation (as defined in, or established pursuant to, the Alaska Native Claims Settlement Act ([43 U.S.C. 1601](#) et seq.)) that is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians.
- Check the Tribal box in your entity’s profile in the E-Rate Productivity Center (EPC) during the administrative window (typically October – January). You will also be asked to provide your Tribal affiliation. Designation provides Tribal libraries with:
 - Access to higher discount rates for Tribal libraries at the 85-90 percent discount rate for C2 (services and equipment providing connections within the library).
 - Access to a higher C2 funding floor for Tribal libraries (\$30k in additional funding, \$55k vs. \$25k for the five-year period).

Improving E-Rate for Tribal Applicants

The [Report and Order](#) adopted on July 20, 2023, amended program rules to enhance Tribal applicants' access to the E-Rate program to encourage wider program participation.

- Granted E-Rate eligibility to Tribal higher education libraries also serving as the local public library
- Created a new competitive bidding exemption for libraries seeking C2 services and equipment that costs \$3,600 or less per year, per library
- Increased the maximum C2 discount rate to from 85 percent to 90 percent and the C2 funding floor from \$25,000 to \$55,000 for Tribal libraries
- Provided guidance on cost allocation issues experienced by applicants
- Adopted a formal definition of “Tribal” for the E-Rate program
- Expanded USAC Board of Directors to add a Tribal community representative
- Increased USAC outreach and training on E-Rate and the USF programs for Tribal applicants
- Sought comments on simplification of other program rules for all E-Rate applicants

Step 1: Competitive Bidding

FCC Form 470

FCC Form 470: Description of Services Requested and Certification Form



FCC Form 470 Overview

- In the E-Rate Productivity Center, an application management portal known as EPC, use the FCC Form 470 to start your [Competitive Bidding Process](#). It notifies potential bidders of the types and quantities of equipment and/or services requested.
 - Prepare to evaluate bids.
 - Create an evaluation matrix using the price of the eligible services or equipment as the primary factor.
 - You may use other bid evaluation factors, but price of the eligible equipment and services must be the most heavily weighed factor.
 - [Wait at least 28 days](#) before moving to Step 2: Select a Service Provider.

Step 2: Selecting a Service Provider

Evaluating Bids

Evaluating Bids

- To evaluate incoming bids, create a [bid evaluation matrix](#) or similar document.
- Develop evaluation criteria or factors to assess the bids.
 - You can have one or multiple factors.
 - **The price of the eligible equipment and services must be the most heavily weighted factor.**
 - Other factors, including other non-price factors, can be considered as well, but they cannot be weighted equally or higher than price of the eligible equipment and services.
- The vendor with the most overall points is the winner.
- Resources
 - Review the [How to Construct an Evaluation Matrix](#) webpage
 - Download a [Sample Bid Evaluation Matrix](#) (PDF)

Bid Evaluation Matrix

Evaluate your bids using a matrix, filled in with your chosen factors and point values.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of eligible equipment and services	50	15	50	35
Prior experience with vendor	20	20	0	20
Service provider bonded	20	7	13	20
Local or in-state vendor	10	10	8	7
Total	100	52	71	82

Result: Vendor #3 wins. Note that this may not be the lowest cost vendor.

Resources and Reminders for Selecting a Service Provider

- **Resources**

- Review the [How to Construct an Evaluation Matrix](#) webpage
- Download a [Sample Bid Evaluation Matrix](#) (PDF)

- **Reminders**

- Your [FCC Form 470](#) and your request for proposal (RFP), if you issued one, must both have been publicly available for the same [28-day period](#) before you can close your competitive bidding process.
- Once you have chosen your service provider(s) and signed a contract (if applicable), you can file an FCC Form 471 to apply for discounts as soon as the [FCC Form 471](#) application filing window opens.
- Document Retention
 - You must keep all [documentation](#) for at least 10 years from the last date to receive service.
 - For multi-year contracts this means 10 years from the contract expiration date.

Contracts

- Applicants must have a signed contract or other legally binding agreement in place and loaded in EPC **prior** to submitting their FCC Forms 471 to USAC.
- Applicant must not sign a contract before the Allowable Contract Date (ACD), which is 28 days after the FCC Form 470 is filed or the RFP is posted, whichever is later.
- Signed contracts constitute the best evidence that a legally binding agreement exists and must not be signed before the minimum 28-day period is completed.
- A verbal offer and/or acceptance will not be considered evidence of the existence of a legally binding agreement.
- Learn more on the [State Master Contracts](#) webpage.
- Instructional Videos
 - [How to Create a Contract Record](#) (5:58 mins)
 - [How to Create a Contract for Low-Cost High-Speed Internet](#) (4:55 mins)

Questions?

New! Tribal Library E-Rate Advocacy Program (T-LEAP)

Tribal Library E-Rate Advocacy Program (T-LEAP) Overview

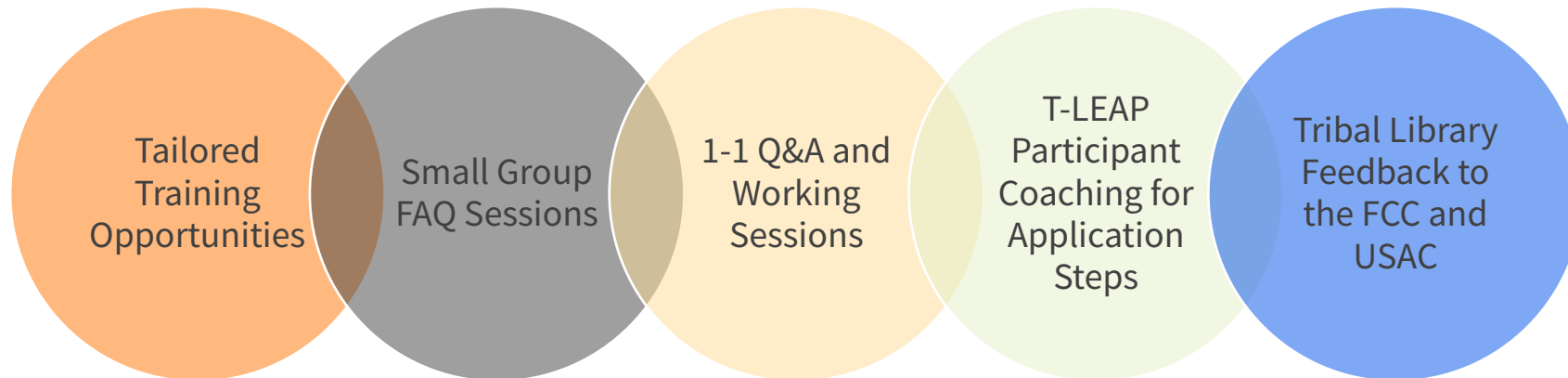
- One-on-one assistance in all aspects of preparing, applying, and receiving E-Rate support during the upcoming funding year.
- Trainings designed to help you apply for funding, including:
 - How to use the E-Rate Productivity Center (EPC).
 - Walkthroughs of the competitive bidding and application processes, including timelines and information needed to complete competitive bidding and the application.
- Hands-on support while completing the different E-Rate forms and processes needed to apply for and receive E-Rate funding.
- Applications accepted year-round with three focused trainings yearly.

T-LEAP Plan

- Partner with a Tribal Library Advocate (TLA) who will meet with your team one-on-one, provide resources and walk you through E-Rate processes.
- Sessions will be led by E-Rate TLA and scheduled according to your schedules and the 2025 funding cycle.
 - The number of sessions may depend on your needs, but you can expect both individual and group sessions each month.
- Receive resources and guidance to complete tasks like assessing your library's IT technology needs, determining your library's discount rate, and completing any other necessary registrations.
- Provide feedback, so that we can continue to simplify and enhance the E-Rate experience for all Tribal school and library participants.

T-LEAP Plan

- You can expect a cohort-based learning/support model
 - A mix of one-on-one assistance combined with group sessions to collaborate with fellow Tribal library participants.



T-LEAP – Tips for Success

- Tribal libraries that have support and participation from Tribal leadership, library staff, and IT staff are more likely to complete the E-Rate funding process.
- The beginning of the Pilot Program is most busy – identifying IT needs, completing the competitive bidding process, and completing the application process.
- USAC offers an [E-Rate Fall Training](#) series. We recommend joining these sessions to learn more about the program.
- Most E-Rate applicants must perform a 28-day competitive bidding process before completing the application process.
- [Sign up](#) for T-LEAP.

Questions?

Resources

Resources

- For program information, visit the [E-Rate](#) webpage.
- Interested Tribal libraries can sign up for T-LEAP [here](#).
- Schools and libraries interested in applying can visit the [E-Rate Applicant Process](#) page.
- For webinars, videos, and [Tribal FAQs](#), visit the [Learn](#) page.
- [Subscribe](#) to the Tribal and E-Rate Newsletters.
- For general USAC Tribal information, visit the [Tribal Nations webpage](#).
- Email the Tribal Liaison at TribalLiaison@usac.org.

Resources – Before You Begin

- [E-Rate Program At-A-Glance for New Applicants](#) (PDF)
- [Registering for a Billed Entity Number \(BEN\) Checklist for New Tribal Library E-Rate Applicants](#) (PDF)
- [Frequently Used Terms](#) (PDF)
- [Towards Gigabit Libraries Toolkit](#) (PDF)

Resources – Competitive Bidding (FCC Form 470)

- [FCC Form 470 Services Guiding Statements Reference Table](#) (PDF)
- [How to file an FCC Form 470 eLM](#) course
- [Eligible Services List](#) webpage
- [Eligible Services 101 Webinar](#) and [Slide Deck](#) (PDF)
- [Sample FCC Form 470](#) (PDF)

Resources – Waiting 28 Days, Evaluating Bids, and Selecting a Service Provider

- [28 Day Waiting Period](#) page
- [How to Construct an Evaluation](#) page
- [Sample Bid Evaluation Matrix](#) (PDF)
- [Selecting a Service Provider](#) page

Resources – Applying for Discounts (FCC Form 471)

- [FCC Form 471 Submission Check List](#) (PDF)
- [FCC Form 471 Videos](#)
- [Find Your Library Discount Guide](#) (PDF)
- [Discount Matrix](#) (PDF)

Resources – Starting Services (FCC For 486)

- [Deadlines Tool](#)
- [FCC Form 486 and CIPA](#) videos
- [Receipt of Service Confirmation and Children’s Internet Protection Act Certification Form](#) (PDF)

Resources – Invoicing

- [Invoicing Requirements Guide](#) (PDF)
- [Submitting and Certifying Invoices in EPC](#) course
 - [Course Summary](#) (PDF)
- [Invoice Management and Status in EPC](#) course
 - [Course Summary](#) (PDF)
- [Invoice Notifications and Outreach in EPC](#) course
 - [Course Summary](#) (PDF)

E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

Thank You!



Universal Service
Administrative Co.