

**Nothing in the document should be taken to contradict or supersede the information on the USAC Web page.**

## **E-RATE TECHNOLOGY PLANS**

**Who:** Libraries that intend to apply for E-Rate discounts on anything other basic telephone service and/or Centrex service. If you are using anything other than cell phones or a telephone line, you need a technology plan. See <http://www.usac.org/sl/applicants/step02/basic-telephone-service.aspx> for a definition of basic telephone service.

**What:** Show that you are planning ahead, not just buying the latest awesome tech toys. Cover the services for which you will want discounts. Include the required five elements as outlined below.

**When:** Save a dated draft covering all 5 elements before you post your Form 470. Have an approved, or certified final document before the discounted services start date as reported on Form 470.

**Where:** See <http://www.usac.org/sl/applicants/step02/>

**How:** Write your plan and submit it with the certification form to the E-Rate Consultant at your regional library system. Plans are reviewed and certified by the library system staff prior to review and certification by the Illinois State Library.

**How long:** Cover no more than 3 years, but write a new one before your plan can expire during a funding year.

**How detailed:** Length and degree of detail vary by the complexity of the entity or organization and the type of services for which discounts are requested. The plan need not be lengthy as long as it covers the five elements.

**Content: The plan must contain the five elements as listed on the Web site and the certification form.** They do not need to be in order, but should be labeled or under headings that identify which of the five elements is being addressed.

1. *Goals and realistic strategy for using telecommunications and information technology*
  - a. List or number your goals involving technology in your library. Please label them for easy identification.
  - b. Name actions that your library will take to work toward each goal.
2. *A professional development strategy*
  - a. Professional development should cover both librarians and technical staff.
  - b. State the type of training needed.
  - c. Tell where the training is offered and who is supplying it.
  - d. Explain how your institution will encourage staff to get training. Ex: Paid time off to attend classes and/or paying mileage to travel to sessions.

- e. While not part of the actual plan, it's advisable to keep a log or list of classes or training sessions that are attended by your staff to show that the topics are relevant to your goals and your staff actually attends.
3. *An assessment of telecommunication services, hardware, software, and other services needed*
    - a. Describe how you assessed your telecommunications and technology needs. Explain how you identified the needs.
    - b. List the services, hardware and software owned or contracted by your library.
    - c. Itemize the services, hardware and software needed by your library. Explain how these needs relate to your goals.
  4. *Budget resources*
    - a. State the amount budgeted for these products and services the first year.
    - b. Give your budgeting forecasts for the following years of the plan.
    - c. Mention other sources of funds for these products and services.
    - d. If you apply for a discount on telephone service, include how you will pay the undiscounted portion of your phone bills.
  5. *Ongoing evaluation process*
    - a. Describe your plan for regular evaluation of your progress toward your goals.
    - b. Explain how and when you will reassess technology needs.
    - c. Tell who will do the evaluation. Will your director evaluate? Will your board include periodic progress reports in regular business?

**Certification form:**

[http://www.cyberdriveillinois.com/departments/library/what\\_we\\_do/pdfs/e-rate\\_certificationform.pdf](http://www.cyberdriveillinois.com/departments/library/what_we_do/pdfs/e-rate_certificationform.pdf)

**Please fill in your name and address on the lines under your library or consortia name on the certification form.**

**Contact:**

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Jesse White, Secretary of State and State Librarian