

E-RATE NEWSLETTER FOR MI LIBRARIES

SEPTEMBER 2009

BTU Consultants

Important E-rate Filing Dates:

- *Form 472 for FY2008 (BEAR) - October 28, 2009*
- *Form 470 for FY 2010 (the filing window is now open however the closing date has not been announced yet)*
- *Form 471 for FY 2010 (the filing window has not been announced yet)*

E-RATE TRAINING WORKSHOP

The Library of Michigan is offering two E-rate training workshops in October. The registration information will be added to the E-rate page at

<http://michigan.gov/erateforlibraries> soon.

There will be a workshop in Lansing at the Lansing Community College West Campus on October 26th and one in Gaylord at the Otsego Club on October 27th.

Don Dietrich will conduct the training again this year. His approach is informational and informal. Don has been providing E-rate consulting and training since the inception of the program in 1998. He will be available during breaks and before and after the workshops to help with any specific issues you may have. These workshops are small and informal yet very beneficial

to all levels from novice to E-Rate veterans. The training will include a tour of many online websites and other resources. Handouts will be provided to all attendees and copies of the presentation and other useful information will be provided.

Save the date for the closest workshop to you, and look for registration information coming soon.



BEAR FORMS

The first deadline this fall is with the BEAR forms for FY2008. The deadline is October 28, 2009. This is not only the date for you to file your BEAR forms but it is also the last day for vendors to file invoices if you are using discounts.

Common BEAR problems:

- If you file a BEAR form online contact

the service provider so they know it is there.

- If you filed your BEAR and received a notification letter with the amount of \$0.00 then that means your BEAR was rejected and you need to re-file.
- You can only claim reimbursement for the actual amount

spent. If you were approved for more than you actually spent you may want to file a Form 500 to release the discounts back into the SLD pool of funds to be used for other applicants.

Inside this issue:

Training Workshop

Bear Forms

Form 470

E-rate Hotline



E-rate News, Tips and Tricks

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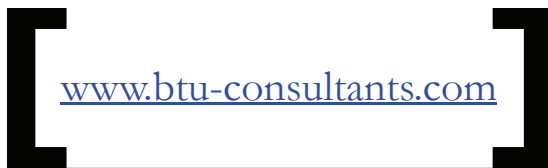
Primary Business Address
1293 Pinehurst Club Ct
O Fallon, MO 63366

Phone: 888-307-6569

E-RATE HOTLINE

We are ready to assist you with your E-rate questions. BTU Consultants has been hired by the Library of Michigan to provide E-rate consulting for all libraries in Michigan.

If you have E-rate questions please call the hotline at **888-307-6569**



FORM 470

As you begin planning for the 2010 Funding Year, you should review your library's Technology Plan and have a good idea of the specific goods and services that you will be required to meet your Tech Plan's goals. With these requirements in mind, you can layout plans for determining which goods and services will need to be listed on your Form 470.

Unless you are under a multi-year contract from a previous year, most goods and services must be posted on a Form 470 every year. This includes all Tariff and Month-to-Month services. You should also check with your purchasing department

to find out if you are required to issue formal RFPs or bids for any of the items that you plan to request. While the SLD does not require formal RFP's, they do require that you adhere to local and state procurement rules. If you do issue a separate RFP, you must indicate this on your Form 470 and you must coordinate the timing so that both the RFP and the Form 470 are open and available for the same time period of at least 28 days.

Most funding requests do not involve a separate RFP, so the main purpose of the Form 470 is to solicit proposals from Service Providers that offer the goods and services that you need. The SLD

requires that all funding requests be based on an open and fair competitive process. To ensure compliance, you must describe your needs in sufficient detail to allow potential vendors an equal playing field. Write your descriptions in plain language and be as descriptive as you can. You should also develop the selection criteria that you will use to select your vendor at this time.

Finally, remember that you must post the Form 470 for at least 28 days before making your vendor selection and that you must document all responses and proposals received. In the next issue we will talk more about the selection process and moving to the Form 471.

