



Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Report to the Joint Legislative Education Oversight Committee

School Connectivity Initiative

Session Law 2007-323, Section 7.28.(d)
(House Bill 1473)

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Report #1

For period beginning August 1, 2007

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Executive Summary

Executive Summary

Pursuant to *Session Law 2007-323 SECTION 7.28.(d)*, we offer this School Connectivity Initiative (SCI) report. In this report we provide an update on SCI progress beginning August 1, 2007 and ending January 6, 2008. The core provision for the SCI is specified as follows:

SECTION 7.28.(b) As recommended in the Joint Report on Information Technology, February 2007, the State Board of Education shall contract with an entity that has the capacity of serving as the administrator of the School Connectivity Initiative and has demonstrated success in providing network services to education institutions in the State. The funds appropriated in this act shall be used to implement a plan approved by the State Board of Education to enhance the technology infrastructure for public schools that supports teaching and learning in the classrooms. The plan shall include the following components:

- (1) A business plan with timelines, clearly defined outcomes and an operational model including a governance structure, personnel, e-Rate reimbursement, support services to LEA's and schools and budget.*
- (2) Assurances for a fair and open bidding and contracting process;*
- (3) Assurances for a fair and open bidding and contracting process;*
- (4) Technology assessment site survey template;*
- (5) Documentation of how the technology will be used to enhance teaching in learning.*
- (6) Documentation of how existing State-invested funds for technology are maximized to implement the school connectivity initiative;*
- (7) The number, location and schedule of sites to be served in 2007-2008 and in 2008-2009; and*
- (8) Assurances that local school administrative units will upgrade internal networks in schools, provide technology tools, and support for teachers and students to use technology to improve teaching and learning.*

The NC State Board of Education approved the *School Connectivity Initiative Implementation and Operating Plan* on Thursday, August 2, 2007. The SCI program is managed through the NC ITS enterprise project management office under PPM projects that gained initial EPMO approval in September 2007. The SCI implementation and operating plan defines 5 strategies as follows:

1. Establish a shared education backbone that provides for K-12 **connectivity**
 - Transition all LEAs to fiber-based wide area network solutions such as metro-Ethernet where feasible
 - Interconnect local (last mile) service providers and regional Internet Service Providers (ISPs)
 - Establish common service level agreements with last mile service providers
2. Provide an opt-in **services** model that includes:

- A comprehensive set of core services supporting reliable, high-bandwidth connectivity including central E-rate and engineering services
 - Value-added network services offered to improve operational efficiency within and among LEAs
3. Implement a community-driven **collaboration** model
 4. Develop an effective and efficient operating **organization** under a 501c(3) not for profit umbrella corporation
 5. Sustain the operation leveraging myriad **funding** resources including state, federal, local, and private sector.

These five strategies serve as the framework for outlining a 3-year business plan. We are now at the midway point of the first year. The emphasis during the first half of year-1 as specified in the plan is the execution of contracts, the establishment of the E-rate service bureau function, initiating the connections of LEA networks to the NC Research and Education Network (NCREN) backbone, and the establishment of a community-vetted allocation mechanism for funding local LEA network costs. To date our accomplishments include the following.

- Identified and visited 40 high priority LEAs - where priority was defined based on strength of existing connectivity implementation, district wealth quotient, and pressing needs to support emerging programs such as Learn and Earn Online, NCVPS, and technology pilots.
- Designed solutions to address pressing connectivity issues in 25 LEAs – presented non-recurring funding request of \$980K and summary design to the NC SBE at December 2007 meeting – contracting is under way.
- Developed, posted, and awarded an RFP for professional E-rate support services. We have retained E-rate Central, a nationally recognized leader in E-rate consulting and services, to support our E-rate service bureau functions under the management of the DPI state E-rate coordinator.
- Provided regional E-rate training for all LEAs.
- Engineered the solution for connecting each LEA to the NC Research and Education Network.
- Posted E-rate competitive procurement (470) forms soliciting bids for telecommunications transport connections between LEA central offices and the NCREN backbone.
- Convened working groups comprising LEA technical directors to vet and develop plans for E-rate services and connectivity funding allocation.
- Developed an MOU between local school administrative units and the NC SBE that documents the “assurances” specified in the special provisions of SL2007-323 Section 7.28.(b) and 7.28.(c).
- Developed and deployed an initial online measurement and monitoring resource for K12 connectivity accessible at <http://tools.ncren.net/k12/>.
- Developed and deployed connectivity communications and resource page accessible at <http://connectivity.fi.ncsu.edu/>.
- Developed an MOU between NC ITS and DPI to enable the application of state telecommunications contracts in accordance with federal E-rate guidelines.

The remainder of this report provides supporting documentation and is organized as follows:

1. An **SCI Expense Report** summarizing expenses against recurring and non-recurring School Connectivity Initiative funding to date.
2. The **FY2007-2008 funding addendum** to the SCI plan. This 2-page document is pre-pended to the plan offered to the SBE in August of 2007 and provides context that relates the plan to the SCI legislation as approved in S.L. 2007-323. Of note is that budgets in the plan reflect recurring funding at a \$24M level.
3. The **School Connectivity Initiative Implementation and Operating Plan** as approved by the NC State Board of Education on August 2, 2007.
4. A **Project Status Report** generated from the NC ITS project management tool on January 14, 2008. This report is based on the “Establish K12 Common Network” project that is the primary EPMO-managed project for the SCI.
5. A **Detailed Business Case Report** generated from the NC ITS project management tool on January 14, 2008. This report is based on the “Establish K12 Common Network” project that is the primary EPMO-managed project for the SCI.
6. Detailed **SCI Resource Plans** that specify tasks, deliverables, and required resources for FY08. We developed these granular resource plans in order to develop timelines and budget for Year 1 work. There are 3 resource plans: one for connectivity strategy tasks; one for services tasks; and, one that covers organization and funding tasks.
7. The **E-Rate Central Proposal** to provide E-rate support services to the State of North Carolina as bid in RFP 40-E-RATE Bureau. E-Rate Central is a nationally recognized E-rate consultancy and service provider. The E-rate services contract was awarded to E-Rate Central and the content of the proposal serves as the basis for the scope of work and costs. We offer this information pursuant to S.L. 2007-323 Section 7.28.(f). Note that further state positions and contracts shall be defined and reported during the first quarter of calendar year 2008.

Expense Summary

School Connectivity Non-Recurring Allocated Expenditures # 100040947110	Status	Acct#	EP#	Development	Justification
Available Funds FY08				\$5,846,971.00	\$6,000,000.00 subtract \$153,028.07 spent in FY07 leaves 5,846,971.00
LEA Connectivity Reimbursements		532150	4476711	\$200,000.00	WinstonNet Consortium -NCDPI will reimbursement the LEA's for expenditures of HW purchases to prepare for Statewide connectivity as defined by The Friday Institute Site Surveys.
LEA Connectivity Reimbursements		532150	4476020	\$130,000.00	Wilson County Schools
LEA Connectivity Reimbursements		532150	4476653	\$3,000.00	Weldon City Schools
LEA Connectivity Reimbursements		532150	4476655	\$3,000.00	Hertford County Schools
LEA Connectivity Reimbursements		532150	4477750	\$6,000.00	Northampton County Schools
LEA Connectivity Reimbursements		532150	4494283	\$621,000.00	WRESA
LEA Connectivity Reimbursements (moved from reserve)	NEW	532150		\$8,527.96	Ashe - Ashe County Shools currently procures 13 Mbps of Internet capacity from SkyBest Communications of West Jefferson, NC. Their connection to the Internet has become congested and as a result many applications suffer performance degradation. ACS will be filing E-rate during the FY08-09 filing window requesting increased Internet connectivity services. An approved E-rate filing will cover new costs starting July 1, 2008. ACS has received a quote from SkyBest Communications for an additional 7 Mbps of Internet capacity - bringing their total to 20 Mbps. The cost for the additional capacity is \$1218.28 per month. This will allow ACE to see immediate performance increases though the upgrade in capacity will have no E-rate discount until July 1, 2008. \$1218.28/month x 7 months = \$8527.96.
LEA Connectivity Reimbursements (moved from reserve)		532150		\$18,019.62	Hyde - The new circuits are ordered and due in on Nov. 27, 2007. The funding requested would cover the difference of the New Configuration minus the Old Configuration's committed E-rate funds for a period of seven months. GLF will continue to pay the balance from E-rate thru 2011

LEA Connectivity Reimbursements <i>(moved from reserve)</i>	NEW	532150		\$122,500.00	Lee - During the FY07-08 E-rate filing window LCS filed for fiber-based WAN services. Windstream was awarded the contract and SLD approved the E-rate request. As part of the E-rate eligible Windstream contract there is a substantial one-time install charge of \$490,000 - after a 75% E-rate discount LCS is responsible for \$122,500.
LEA Connectivity Reimbursements <i>(moved from reserve)</i>	NEW	532150		\$16,000.00	Madison - Laurel Elementary School needs to be added to the Maison County fiber facilities. FBEC has provided a cost estimate for the 6 mile fiber run at \$80,000 onetime with an estimated recurring cost less than \$200/month. This fiber facility would replace a cost of \$1,450/month (the current T-1s. cost). Madison County is planning to file for E-rate for this installation using the school's individual percentage of 80%. Madison County Schools would need help with the remaining 20% (\$16,000)
LEA Connectivity Reimbursements <i>(moved from reserve)</i>		532150		\$25,000.00	Mooresville City - The district has requested engineering help and some funding help for the wireless LAN infrastructure. A wireless LAN blueprint suitable for a 1to1 program costs \$100,000. The city is providing \$75,000
LEA Connectivity Reimbursements <i>(moved from reserve)</i>	NEW	532150		\$300,000.00	Rutherford - Rutherford County Schools filed an E-rate application for fiber-based wide area network services during the FY2007 window. SLD approved the E-rate application with e-Polk as the provider. In order to complete the fiber build throughout the RCS system additional fiber build is required to reach several outlying schools. MCNC, e-Polk, Dukenet, the Goledn Leaf Foundation, and ITS are partnering to provide connectivity between all schools in the county and to the statewide backbone. Added and additional 50k for Rutherford county 12/20/07

LEA Connectivity Reimbursements <i>(moved from reserve)</i>		532150		\$99,464.12	WinstonNet - Since the WinstonNet network is a regional component of the NC Research and Education Network (NCREN), this filing is essentially the same as filing to connect 10 LEAs to the NCREN backbone. That filing was approved by SLD with Time Warner Cable as the provider. The total non-discount share is \$99,464.12 - with an E-rate discount of 69%
LEA Connectivity Reimbursements <i>(move from reserve)</i>		532150		\$387,270.00	WNCEdNET - The WNCEdNET group has partnered with the Golden Leaf Foundation and local community foundations and Industry to collect over \$3M in private funding. A single Macon county remote fiber run is necessary to complete the project. The cost of the remote fiber run of 36.2 miles is \$387,270
LEA Connectivity Reimbursements <i>(move from reserve)</i>	NEW	532150		\$31,500.00	Yancey - FBEC has provided a cost estimate for the 10.5 mile fiber run at \$150,000 one time cost for Bee Log and \$7,500 one time cost for South Toe. Yancey County is planning to file for E-rate for this installation using the school's individual percentage of 80%. Yancey County Schools would need help with the remaining 20% (\$31,500.00)
SCI - Planning Project	Closed	532150	4437818	\$423,651.00	The Friday Institute will develop a plan documenting a business framework and operational model, governance and advisory structure, e-Rate consortium plan and financials Technology assessment site survey template; Documentation of technology assessments (e.g., Google maps); Execution plans and budget for each of at least three pilot sites/regions; A process for application, review, and funding of phase two (non-pilot) sites/regions; Material support as requested to support the legislative process; program level business case (Cost / Benefit

SCI - Establish the K12 Common Network	In Work	532150	4494908	\$1,359,032.00	The Friday Institute will Connect 80% of the 115 LEA's to the education newtwork this year; Complete 33% of the 2400 K12 schools LAN assessments; Establish Nework Monitoring for 33% of the 2400 K12 schools Connect 25% of the K12 Schools to the LEA hub; Deploy 4 approved Connectivity Pilots which includes 23 LEA's. Note: \$45,468 reduction
SCI - Technology Master Plan Assistance - PR7362004	RFP Pending	532140	xxxxxxx	\$430,000.00	This project will establish an overarching NCDPI strategic technology plan that align with the State technology plan and LEA needs. The vendor will define the planning process for local education agencies, and develop a master plan for the state agency.
SCI - Establish Core Functions of NCEdNet - PR7371765	12/14/07	532150	4513550	\$422,707.00	The Friday Institute will Identify and Prioritize set of 'Core' Services for the K12 Common NCEdNet; Establish E-Rate Service Bureau; Establish Network Engineering Service Bureau. Note: \$150k savings
SCI - Establish Governance Plans of NCEdNet	12/14/07	532150	4513548	\$310,632.00	The Friday Institute will develop & Implement an Collaboration Plan; Develop & Implement an Organization Plan; Develop & Implement a Funding Plan
SCI- NCVirtual	??	5890		\$300,000.00	Hold in reserve for NCV
School Connectivity Reserve for Survey Results		5890		\$629,667.30	Hold in reserve for LEA Connectivity services defined by the Friday Institute during site surveys. Move \$958,281.70 from reserve effective 12/12/7 for LEA reimbursements as noted above. Added and additional 50k for Rutherford county 12/20/07
Total Planned Cost				\$5,846,971.00	

School Connectivity Recurring Allocated FY08				\$12,000,000.00	
Expenditures # 100010108110/0802 53xxx 254025140					
Ed Chase E-Rate Travel Reimbursements	NEW	532721/14/4		\$15,000.00	E-Rate Travel reimbursements
E-Rate Training Refreshments (12 sessions x \$100.00)	NEW	535890900		\$1,200.00	To be reimbursed to Ed Chase
Funds for Learning	NEW	532441		\$3,000.00	E-Rate Manager State Coordinator License
Connectivity NCEdNet BackBone Support;		532150		\$1,500,000.00	The Friday Institute for contractual (NCEdNet) support for the Common Network and services as purchase orders and invoices are received.
Funds for Learning PR7296549 V2	Done	532441		\$11,500.00	for Funds for Learning E-Rate software licenses,
E-Rate Central PR7340812	Done	532140		\$4,900.00	for E-Rate consulting services
E-Rate Central PR7340712	In Work	532140	4517018	\$108,000.00	12 month contract for E-Rate consulting services to assist with establishing E-Rate Bureau and E-Rate Training for LEA's and DPI.
New Hires for E-Rate & Engineering Bureau (8 planned)		5890		\$1,000,000.00	Hold in Reserve for new hires
SCI- NCVirtual	??	5890		\$300,000.00	Hold in reserve for NCV
Connectivity Reimbursement Cost to LEA's	In Work	5890		\$9,056,400.00	Hold in Reserve for LEA connectivity reimbursements.
Total Planned to Date				\$12,000,000.00	

Funding Addendum For 2007

School Connectivity Funds for 2007-08

The following plan is recommended by the School Connectivity Advisory Group to begin implementation of the School Connectivity Initiative as developed by the Phil Emer and the School Connectivity Project team. The full plan is based on an annual allocation of 24 million recurring funds based on a 60% e-rate reimbursement. Since the General Assembly is allocating 12m rather than 24 m, it became necessary to modify the plan to support that level of funding.

YEAR 1 Transition Plan. In order to facilitate the implementation of the School Connectivity Initiative for 07-08, the following steps will take place.

A. Prioritized LEAS. LEAs to be connected will be prioritized by the State Board of Education based on those identified for Low Performing or Manning Schools, Easley Schools, Learn and Earn on line, and NCVPS. (see attached list) The list includes the results of testing by the Connectivity team to determine connectivity and infrastructure readiness. A final list of recommendation has not yet been determined.

B. MCNC/ITS. Leadership from NC Information Technology Services (ITS) and Microelectronics Center for N C (MCNC) will work together to begin connecting LEA's to the North Carolina Research and Education Network (NCREN) which currently provides Network and connectivity to the University of North Carolina's sixteen campuses.

ITS/MCNC will work from their existing points of presence (POPS) using whichever one is the closest to the prioritized LEAs approved by the SBE. The providers (AT&T, Time Warner, Embarq, etc) have already been contacted and have agreed to use state negotiated pricing for either MCNC or ITS POPS.

C. Services. There are three primary services that are needed- Project management, E-rate and Engineering.

- In year one, the Engineering Services will be contracted or provided through the existing team working on the connectivity initiative, ITS or MCNC. The engineers will go into each school and assess its current infrastructure and provide a report of what is needed to successfully connect each school to the statewide network so that they can take advantage of the resources available to them through the network such as Learn and Earn on Line and NCVPS.
- E-rate services for the transition year will also be contracted using existing LEA or state level staff that work successfully with e-rate. Providing these services should free up some of the time that regional instructional technology staff have provided allowing them to focus on instructional technology as well as provide support directly to the schools since the engineers will have to work directly inside the schools assessing and upgrading infrastructures.
- Project management is also needed and should be provided using the existing arrangement with the Friday Institute until a permanent organizational structure can be established.

Due to the urgency to get schools upgraded and connected and the time needed to establish positions, contracting for services is recommended so work can continue while positions are being created. By the end of year one, an operational structure will be in place to sustain the continued implementation of the school connectivity initiative.

Budget

1. Funding. The funding section of the attached budget includes the estimated federal e-rate reimbursement which will be coming back into the state to offset costs for the school connectivity. It includes current GoldenLeaf Grants in the western and northeastern part of the state to support connectivity, the Cisco Fellow Grant of two on loan engineers who have worked with the school connectivity pilot, MCNC's in kind upgrade to the backbone so that it can accommodate the addition of the schools, and the 12 million recurring appropriation of which the majority goes to provide connectivity charges for the schools.

2. Operational Expenses. This section includes staffing needs reduced to reflect the 12 million appropriations. The Project management includes compensation for a project manager, administrative assistant and program manager. Also included is the Cisco Fellow and general costs for MCNC administration and in kind from MCNC and ITS for the backbone operations. Supplies and materials are self explanatory and travel will cover travel expenses to and from the schools being assessed and connected. The current services reflect the cost for each LEA's existing connectivity charges and the New Connectivity covers the charges for connecting approximately 793 schools to the statewide network.

The new connection will afford all schools equal access and the necessary bandwidth for them to take advantage of the resources such as NCVPS, Learn and Earn on line, multi media and resources available via the statewide network. By having the state pay for the existing connectivity for all districts LEAs will have resources to begin upgrading their internal infrastructures based on the assessments completed by the engineers during year one so that they are ready to connect to the network in year 2.

3. Capital and other one time Expenses: Upgrade to the backbone is a necessary one time expense that MCNC has chosen to provide of out of its existing resources. The establishment of the NCVirtual at the Education Cabinet level is to help facilitate the coordination of all of e-learning across all of education, ensure optimal use of state investments and establish one stop portal that will direct all citizens to learning opportunities in NC.

July 20, 2007

School Connectivity Initiative Implementation & Operating Plan

School Connectivity Initiative Implementation and Operating Plan

School Connectivity Team
June 29, 2007

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Introduction

This report outlines a detailed plan for the implementation of a pre-K12 Education Network for the State of North Carolina. The plan is based on the direction of the School Connectivity Initiative assumptions and drivers for development of a pre-K12 Education Network from the Joint report on Information Technology-Presented to the 2007 Session of the General Assembly, e-Learning commission reports I and II, the 2005 and 2006 Business Education Technology Alliance (BETA) reports and the e-NC Building Regional Education Networks feasibility study. Specifically, The Joint Report on Information Technology – Presented to the 2007 Session of the General Assembly, January 2007, outlines 4 essential elements for future-ready schools in North Carolina as being necessary to reach the North Carolina State Board of Education’s priority and goals for 21st century students achieving 21st century outcomes – specifically, the Joint Report defines:

Essential Element 1: 21st Century curriculum, instruction, assessments, and accountability

Essential Element 2: Technology tools in the classrooms

Essential Element 3: Personnel and professional development

Essential Element 4: Connectivity, networks and accountability

BETA, The School Technology Commission, and the Joint Legislative Oversight Committee on Information Technology jointly support the Joint Report. The Joint Report is the culmination of several years work to assess the needs of public schools and the role of the state in supporting those needs through technology.

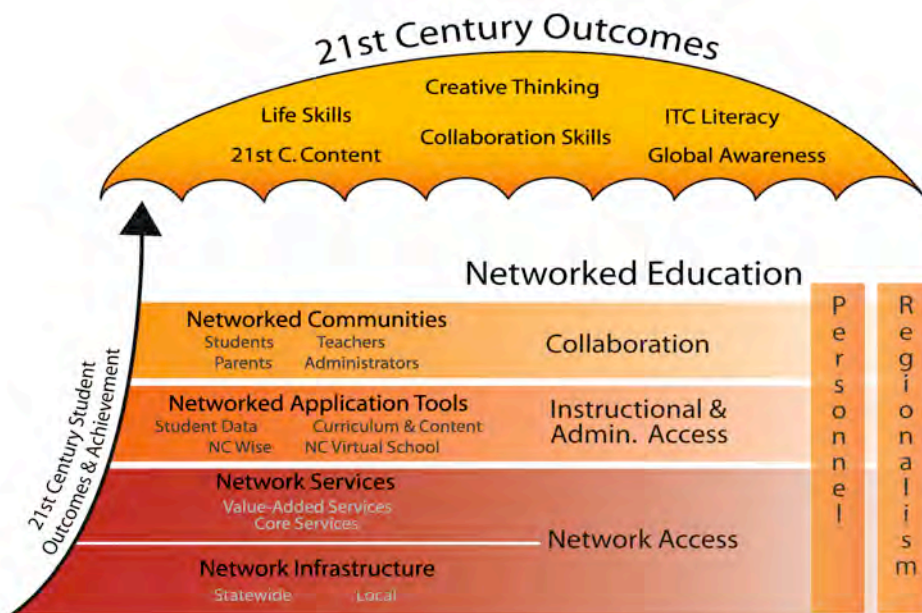


Figure 1 Essential Elements for Future-ready Schools

Figure 1¹ illustrates the relationships of the four essential elements as they relate to achieving 21st Century Outcomes as measured by Student Achievement. In future-ready schools (both brick and mortar and “virtual”) networked communities of educators, students and parents collaborate to achieve commonly shared 21st century outcomes. These networked communities collaborate using a set of instructional and administrative tools delivered as online (web) services. The School Connectivity Initiative is primarily focused on network access, and the personnel that provide for engineering and support of the infrastructure and service elements related to network connectivity. Specifically, through a common statewide network and supporting services the goal of achieving consistent and deterministic access to 21st century curriculum and instruction across all zip codes in North Carolina is attained.

Background

The *Developing Regional Education Networks* BETA report, May 2006, provides background for the development and funding of a statewide education network supporting preK-12 public schools. The report recommends specific actions including:

- Provide a common network backbone
- Establish the NC Education Network
- Plan a 3-year Implementation Timeline

¹ Adapted from Education Networks of America, en@, (<http://www.ena.com/>) presentation materials.

For Fiscal Year 2007, the NC General Assembly appropriated \$6M in Senate Bill 1741 to fund School Connectivity as an initial investment aimed at addressing the recommendations presented in the report. Pursuant to the SB1741 School Connectivity legislation the State Board of Education, the Lieutenant Governor's Office, and the Office of the Governor initiated a School Connectivity Planning Project. The Office of Information and Technology Services approved the School Connectivity Planning Project, DPI0739, in January 2007. DPI0739 deliverables include, "*A plan documenting a business framework and operational model, governance and advisory structure, e-Rate consortium plan and financials.*" In compliance with that deliverable commitment we offer this "School Connectivity Initiative Implementation and Operating Plan."

In developing this plan the School Connectivity Initiative project team based its work on the criteria established by the School Connectivity Advisory Group. The team conducted site surveys with nearly 40 North Carolina Local Education Agencies (LEAs), interviewed representatives from existing K-12 statewide networks, discussed E-rate consortium possibilities with peer state and FCC leaders, and initiated four connectivity demonstration projects (pilots). Through this due diligence process we explored connectivity-related considerations, including:

- A range of representative network architectures
- Opportunity to leverage public-private partnerships
- Best practice operating principles of sustained statewide education networks
- Support for regional consortia
- Applications and services enabled by connectivity
- E-rate support considerations
- LEA support models
- Organizational models

Informed by our comprehensive planning and diligence process, we offer an operating and execution plan in the sections that follow. The remainder of the plan includes an Executive Summary followed by a detailed description of the five primary operating strategies. Appendices provide supporting data and findings collected during the development of the plan.

School Connectivity Initiative Executive Summary

The *2007-2009 Governor's Recommended Budget*, 2007 House Bill H174 and Senate Bill S135 all recommend recurring funds for the *School Connectivity Initiative*. In short, "The purpose of the initiative is to connect all local school administrative units into a statewide network that ensures broadband connectivity to all schools and classrooms." Said another way, the School Connectivity Initiative funds the development and sustained operation of the NC Education Network (NC EdNET). The NC EdNET comprises a common statewide backbone for education and supporting services to ensure sustainable long-term equity of access.

The common NC EdNET backbone connects NC educators and learners to instructional content regardless of the source of the content or the location of the user. The NC

EdNET provides for deterministic performance in access to instructional content ensuring that all NC learners will have optimized access to existing and emerging rich and interactive content from all North Carolina public schools.

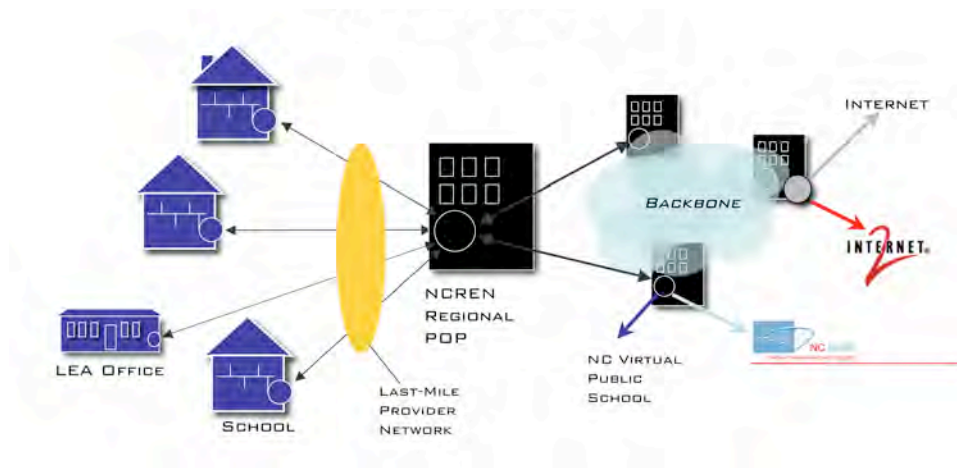


Figure 2 NC EdNET Connectivity Blueprint

Figure 2 illustrates a blueprint for the NC EdNET connectivity model. This connectivity Blueprint accomplishes the goal of providing reliable and secure very high bandwidth services to all LEA's in the state. Currently, very high bandwidth connectivity is confined to certain areas of the state and is either not available or cost prohibitive particularly for rural LEA's.

As a core element to the blueprint the NC EdNET provides for a shared backbone that interconnects all K12 schools to each other, to the Internet, to administrative systems like NC WISE, to emerging online course content like that provided through the NC Virtual Public School, and to the higher education institutions in NC. In the short-term, utilizing NC Research and Education Network (NCREN) and NC ITS network and data center facilities as the core network represents an efficient and cost effective model for core connectivity because it extends use of existing, "cutting edge" infrastructure. Last mile providers, including some of North Carolina's most valued corporate citizens such as AT&T, Embarq, and Time Warner Cable interconnect the schools of an LEA into a LEA specific private wide area network (WAN). These last mile providers also provide connectivity from the LEA WAN to the NC EdNET backbone at a regional point of presence (POP).

In general, federal telecommunications discounts through the E-rate program administered through the Universal Services Access Corporation (USAC) are leveraged for all last mile provider services and for Internet access services. The interconnection of the regional Points of Presence (POPs) in the backbone may be eligible for E-rate discounts though implementation flexibility gained by sharing the backbone across the entire range of K-20 facilities and virtual learning portals in North Carolina likely proves more effective and efficient without USAC/E-Rate interactions.

Network access is supported atop this shared connectivity model with centrally managed services. An initial set of core services is to include at minimum an E-rate function and a network engineering function. The E-rate function provides support to LEAs for managing the processes associated with requesting and bidding for services, and filing for E-rate discounts. The network engineering function provides network consulting resources to LEAs to support network design, deployment, monitoring, troubleshooting, and the like based on the instructional and administrative needs of the LEAs, the schools and the classrooms. Value-added services that leverage the shared NC EdNET infrastructure and support model will bring added efficiencies to LEAs by enabling and facilitating sharing of resources on a regional and/or statewide basis. In the remainder of this section we address guiding assumptions, overall goals, supporting strategies, implementation roadmap, and a funding summary.

Assumptions

The connectivity plan was based on, but not limited to, the following list of assumptions:

- Leverage existing state investments (e.g., invests in MCNC/NCREN, NC ITS, e-NC) to create a statewide education network that provides for sustainable broadband connectivity between all public schools, community colleges, and universities in North Carolina
- Deliver connectivity via Fiber-based metropolitan Ethernet services where available. High bandwidth alternatives will be considered only when fiber-based metro Ethernet is not available or feasible.
- Migrating LEAs/schools to fiber-based metro Ethernet services will be scheduled over a 3-5 year period based on need, existing LEA contract obligations and local access provider build-out schedules.
- NC EdNET will be based on an opt-in model. While most LEA's surveyed have stated they would opt-in, choice is an important aspect of this model.
- Site surveys will be completed in Q3 Calendar Year 2007 to provide comprehensive baseline LEA connectivity data.
- Local access providers will recognize the value of the NC EdNET and will support it appropriately.
- Backbone connectivity and service support models will be developed to optimize overall effectiveness and efficiency in the context of a K-20 service delivery platform – as such E-rate discount eligibility for backbone connectivity and support is optional.

- LEA last mile connectivity (WAN) and ISP service models will leverage the federal E-rate discount program to the greatest extent possible and practical as defined by availability and cost of competitive services.
- Other sources of LEA funding from the State will not be negatively impacted by the availability of connectivity funds.

Other Factors

The connectivity plan also considers the following factors being addressed in the 2007 session of the General Assembly:

- Development of Learn and Earn On-Line to provide college level courses to high schools via distance learning in the Universities and Community Colleges;
- Development of the NC Virtual (NCV) at the Education Cabinet to coordinate e-learning for PreK-20;
- Funding for connectivity for the Community Colleges and Universities;
- UNC-online which provides degrees and other certification programs online.

Goals

This operating plan is focused on six primary goals. These have been selected from a long potential list of “things to accomplish” through the connectivity network equity of access mission described in the earlier Introduction section of this Plan. These goals are supported by subsequent strategies, vetted by the team and community.

1. Provide “equity of access” for all K12 schools
 - Deliver services that support classroom and online instruction Support 21st century skills, classrooms, schools, educators, workforce
 - Provide a common shared network (backbone and local loop)
2. Optimize E-rate process and support statewide
3. Enable and foster public-private partnerships
4. Develop a sustainable funding model
5. Organize to operate
 - Centrally coordinated
 - Leverage existing resources and organizations where possible
 - Funded for efficiency and effectiveness
6. Achieve steady-state within 3 years

Strategies

The School Connectivity Initiative operating plan comprises five manageable strategies. These key strategies reflect significant review by the Connectivity Team and vetting process with many stakeholders including the LEAs, DPI, Government Education and

Technology staff, other state peer network and e-Rate leaders aligned with the State Vision as reviewed in the introduction. This list of five narrows the strategies to a manageable list, but the detailed programs and actions that support them are comprehensive and not neatly packaged into five buckets. To meet and exceed the K12 goals, NC EdNet will:

1. Establish a shared education backbone that provides for K-12 **connectivity**
 - Transition all LEAs to fiber-based wide area network solutions such as metro-Ethernet where feasible
 - Interconnect local (last mile) service providers and regional Internet Service Providers (ISPs)
 - Establish common service level agreements with last mile service providers
2. Provide an opt-in **services** model that includes:
 - A comprehensive set of core services supporting reliable, high-bandwidth connectivity including central E-rate and engineering services
 - Value-added network services offered to improve operational efficiency within and among LEAs
3. Implement a community-driven **collaboration** model
4. Develop an effective and efficient operating **organization** under a 501c(3) not for profit umbrella corporation
5. Sustain the operation leveraging myriad **funding** resources including state, federal, local, and private sector.

Implementation Plan Summary

Based on the stated goals and strategies to achieve those goals we propose a three-year NC EdNET program implementation period during which we will implement projects and programs with a scope of work that includes the following.

- All 2400+ school buildings connected via fiber (or closest practical approximation) to the NC EdNET backbone
- All 2400+ school connections instrumented for remote measurement and monitoring
- Comprehensive set of ‘Core’ services supporting reliable, high-bandwidth connectivity
- Set of value-added services offered to improve operational efficiencies (potentially fee based service)
- Statewide contracts created with Service Providers
- Realize Operational Efficiencies by leveraging regional alliances for common delivery of common services
- Effective governance and advisory groups representing all stakeholders



Figure 3 NC EdNET Implementation Roadmap

Figure 3 provides an overview of the general focus of each of the five strategies – during each of the initial three years of the NC EdNET. In year one, the focus is on building the NC EdNET community and interconnecting last mile service providers to the NC EdNET backbone. Year one provides for a transition from entirely local LEA supported connectivity to a hybrid model with recurring state support. In order to support newly funded initiatives such as the NC Virtual Public School, Learn & Earn Online, and one-to-one computing programs the NC EdNET will be deployed as a transitional hybrid organization. The transitional organization will include the Friday Institute, MCNC, and NC ITS. In year two, E-rate optimizations are gained by leveraging regional cooperatives and consortia. In year three with the regionalized network access in place managed IP services are deployed – providing for improved efficiency within and among LEAs. The following table provides a detailed summary of roadmap actions for each of the first three years of NC EdNET operation for each of the five strategic plan areas.

Table 1 Three-Year Implementation Roadmap

Connectivity		
Year 1	Year 2	Year 3
<ul style="list-style-type: none"> Complete data gathering and analysis 	<ul style="list-style-type: none"> Continue NC EdNET backbone build-out 	<ul style="list-style-type: none"> Finalize NC EdNET backbone and

<ul style="list-style-type: none"> • Complete a multi-year LEA/schools connect plan with priorities • Develop a multi-year local loop connect plan to backbone and standard vendor contracts/terms • Develop/Execute prioritization plan for connectivity upgrade based on funding and data gathering • Develop/Execute plan to interconnect local providers with NC EdNET backbone • Identify initial LEAs to transitions to NC EdNET for ISP services • Perform LEA LAN Health assessments as appropriate • Negotiate with Major Providers to create a standard statewide Metro-Ethernet offering • Standardize CPE hardware and configurations • Negotiate statewide pricing – RFP process 	<ul style="list-style-type: none"> • Expand to complete underserved LEAs/schools • Complete contracts to establish NC EdNET as ISP • Continue prioritized build-out of fiber network • Continue NC EdNET Backbone expansion • Transition LEA Internet access to NC EdNET where prudent 	<ul style="list-style-type: none"> • connectivity upgrades • Upgrade backbone capacity to support load
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Services		
Year 1	Year2	Year 3
<ul style="list-style-type: none"> • Establish an E-rate Service Bureau • Develop a support organization to meet process requirements • Support LEAs with subject matter expertise • Develop consortium plan • Establish a network engineering service 	<ul style="list-style-type: none"> • Expand E-rate service bureau beyond support • Develop consortium plan and start 1st phase • Potential statewide 470 filing • Network Engineering Service Bureau • Build value added services on Core service menu, as needed 	<ul style="list-style-type: none"> • Add managed services as defined by LEAs and coordinate with Regional capabilities • Fully operational operations center • In place set of Core services to reliable connectivity • In place set of advanced services for improved

bureau <ul style="list-style-type: none"> Prioritize Core services <ul style="list-style-type: none"> Network consulting Operations Collaborative services 	<ul style="list-style-type: none"> Regional/centralized network and application services Coordinate local service providers and ISPs Evolve Operations to monitoring, trouble shooting, training Provide Regional/Centralized Network and Application Services Services identified by working groups 	operational efficiencies
Collaboration		
Year 1	Year 2	Year 3
<ul style="list-style-type: none"> Engage existing K12 technology working group structures Develop community advisory structure(s) and process Facilitate service definition through advisory structures Initiate methods and mechanisms for continuous communications 	<ul style="list-style-type: none"> Facilitate formalization of regional consortia as co-ops in the NC EdNET Identify Regional Resources to provide service Extend reach by adding service focused working group structures Initiate and integrate training and community events 	<ul style="list-style-type: none"> Integrate working group and advisory structures across K-20 where appropriate
Organization		
Year 1	Year 2	Year 3
<ul style="list-style-type: none"> Properly design and implement a responsive organization leveraging existing resources Investigate optimal organization to support K20 Education Network 	<ul style="list-style-type: none"> With funding flow, reporting, governance in place, more fully evolve NC EdNET organizational structure Meet all requirements of stakeholders via governance, reporting and advisory processes 	<ul style="list-style-type: none"> Implement preferred and optimal “end game” of a K20 network organization Optimize governance, advisory, accounting, reporting for K12, CC, and Universities. Optimize State Virtual Education organization
Funding		
Year 1	Year 2	Year 3

<ul style="list-style-type: none"> • Establish contracts between SBE (DPI) and MCNC • Establish contracts with support organizations including The Friday Institute and e-NC • Establish LEA connectivity funding and/or expense reimbursement process and procedures 	<ul style="list-style-type: none"> • Add E-rate process requirements for consortium filing • Use metrics for effective and efficient demonstration of NC EdNET value 	<ul style="list-style-type: none"> • Ongoing (recurring) model in place at steady state and predictable costs • Includes partnerships • Establish fee-based pricing models for select value-added services • Optimized E-Rate model (consortium likely) • Flow of funds is effective and accountable to all stakeholders
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Funding Summary

The annual steady state (year 3 forward) cost of K12 connectivity specified in the *Developing Regional Education Networks* report is \$56M per year. As depicted in the waterfall diagram shown in Figure 4, payments to last mile service providers (e.g., AT&T, Embarq, and Time Warner Cable) for telecommunications circuits comprise \$48M of the \$56M total. The balance of annual expenses covers education network backbone operations; core network services support (including E-rate services), administrative and operational expenses, and related network equipment costs.

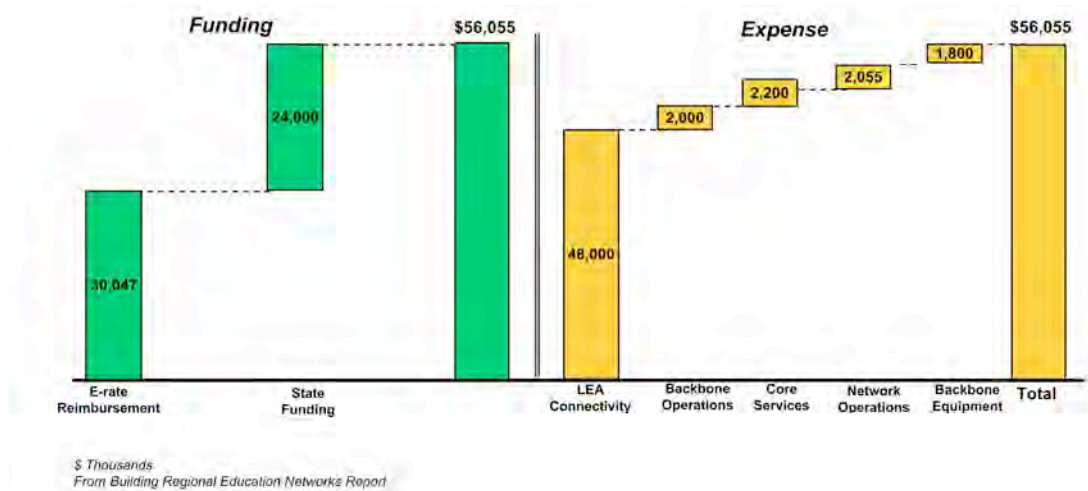


Figure 4 Steady State Financials

In this plan we categorize expenses around operational strategies – specifically, connectivity, services, collaboration, and organization. Further, the last category is the sum of collaboration and organization expenses. Table 2 provides a summary of the total expenses across connectivity, services, and collaboration and organization².

Table 2 School Connectivity 3-Year Cost Summary

	Year 1	Year 2	Year 3
Connectivity	44,529,194	42,912,245	49,837,849
Services	2,722,898	3,924,000	3,924,000
Collaboration and organization	1,538,700	1,025,975	1,022,900
Totals	48,835,792	47,862,220	54,784,749

After applying E-rate discount credits and Golden Leaf grant funding (totaling \$24M in years one and two and \$30M in year 3) to connectivity expenses we see a summary representation of expenses to be funded by state appropriation that totals \$24M (rounded) per year as indicated in Table 3.

Table 3 School Connectivity 3-year Cost After Credits

	Year 1	Year 2	Year 3
Connectivity	20,213,874	19,156,493	19,148,558
Services	2,722,898	3,924,000	3,924,000
Collaboration and organization	1,538,700	1,025,975	1,022,900
Totals	24,520,472	24,106,468	24,095,458

Figure 5 shows year-3 distribution of expenses after E-rate and Golden Leaf connectivity credits. That is, the distribution of state appropriated monies across connectivity, services, and collaboration and organization line items. This represents a highly efficient organization with low overhead costs (4%). Note that year one collaboration and organization costs are somewhat higher (\$1,538,700 versus \$1,022,900) as there are start-up costs – though in year 1 the total contribution of these administrative costs is still only 7% (of \$24M).

² Totals in this cost summary vary slightly from the *Developing Regional Education Networks* report as we have added Golden Leaf funding and re-allocated some expenses due to the non-recurring appropriation under which the School Connectivity Initiative planning project is funded.



Figure 5 Steady State Cost Distribution

Detailed budget projections are included in the appendices and are also broken out in summary form in each strategy section in the detailed plans that follow this Executive Summary section.

Strategy 1: Connectivity

MCNC operates the North Carolina Research and Education Network (NCREN). NCREN serves as the backbone to higher education in NC. NC ITS operates a network backbone that supports state agencies. In the short term (year 1) MCNC and NC ITS facilities and infrastructure will be extended to serve as the backbone to K-12 and for the NC EdNET. It is therefore the responsibility of MCNC and NC ITS to coordinate relationships with service providers that serve to connect LEAs and schools to the Internet and to the NC EdNET backbone. Specifically, MCNC and NC ITS shall:

- Proceed and provide the initial seed capital to upgrade the NC EdNET backbone to support added K12 traffic –
- Establish consistent interconnection agreements with “last mile providers” by 6/30/08. These interconnection agreements will include service level metrics and will provide for reliable and deterministic exchange of content between LEA networks, last-mile service provider networks, and the NCREN backbone.
- Develop a Backbone and Internet Gateway charging model for K12 and gain approval from the FCC by 1/1/08. Specifically, MCNC and NC ITS shall provide for an accounting of the measure of K-12 traffic as it relates to the total traffic carried across the NC EdNET backbone and as it relates to the total traffic carried across NC EdNET connections to Tier one Internet providers.
- Develop process and procedures as necessary to support federal E-rate discount programs.

Efforts over the past two years by the NC Rural Economic Development Center and e-NC Authority, in collaboration with others in the North Carolina education community, have contributed significantly to the increase in K-12 schools with broadband connectivity. Despite these efforts however, approximately 15% of the 115 LEAs remain with minimal broadband connectivity. In addition, many schools with broadband connectivity are still challenged to access content reliably and with predictable performance. This is due in large part to the large number of local providers operating in North Carolina and the lack of an effective interconnection strategy for these providers. This plan effectively overcomes these challenges by leveraging an existing, high bandwidth, secure and reliable network and expanding its reach to K12 with no degradation of service to the networks existing institutional clients.

This section of the Plan focuses on migrating underserved LEAs/schools to broadband connectivity and establishing an effective backbone network to facilitate carrier interconnection.

“Core Services”, covered in a later section, addresses the need to support LEAs with the operational services necessary to sustain and effectively leverage the broadband connectivity.

Objectives

The connectivity strategy has the following major objectives:

- Negotiate statewide contracts with local loop providers that reflect the providers underlying economic and technical realities. For example, the provider's tiered bandwidth pricing should reflect the fact that they incur negligible incremental expense when providing fiber-based metro Ethernet service at 100 Mbps versus 10 Mbps. The contracts must address local and backbone access and include comprehensible service level agreements (SLAs).
- Migrate underserved LEAs/schools to fiber-based metro Ethernet service, or an alternative broadband service, where feasible
- Create L2/L3 peering relationships between NCREN (MCNC), NC ITS, and the LEA local loop providers and residential ISPs
- Develop and deploy a sustainable measurement process for meaningful and repeatable performance analysis of school connectivity

Deliverables

Specific year-by-year deliverables for the connectivity plan are contingent on the outcome of the LEA data collection and analysis effort. In addition, local connectivity upgrade schedules must reconcile with the E-rate process. Since the E-rate funding operates a July 1 to June 30 year, the initial phase of local connectivity upgrades will be effective for the 2008-2009 school year though E-rate filings for the 2008-2009 school year must be initiated prior to January 2008.

Year 1

- Complete data gathering and analysis. Conduct remaining site surveys as necessary. The data analysis includes identifying underserved LEAs/schools and their current/potential local providers, and prioritizing local provider interconnection.
- Develop multi-year plan to address local connectivity needs for underserved LEAs/schools.
- Develop multi-year plan to connect local service providers and residential ISPs to the NC EdNET backbone.
- Negotiate statewide contracts with primary local service providers for standardized services, pricing, and service levels for local services and interconnection.
- Work with LEAs to meet E-Rate process requirements for E-Rate support for 2008-2009 school year local connectivity upgrades. (Preliminary analysis indicates approximately six LEAs will be candidates for local connectivity upgrades for the 2008-2009 school year.)

- Augment NCREN and NC ITS networks as necessary to connect with primary local service providers and residential ISPs.
- Coordinate backbone interconnection with primary local service provides and residential ISPs
- Migrate eligible LEAs to NC EdNET backbone.
- Develop and deploy a sustainable measurement process for meaningful and repeatable performance analysis of school connectivity
- Create end-to-end network performance baselines.
- Perform capacity planning and NCREN and NC ITS backbone upgrades as necessary.
- Work with the State Board of Education to align with existing LEA based initiatives in the State that could benefit from enhanced connectivity and prioritize these districts (Learn and Earn schools, New Schools Project schools, “Bringing it all Together” initiative; Northeast initiative).

Year 2

- Negotiate statewide contracts with secondary local service providers for standardized services, pricing, and service levels for local services and interconnection.
- Work with LEAs to meet E-rate process requirements for E-Rate support for 2009-2010 school year connectivity upgrades. This includes any additional schools identified through the ongoing performance measurement and analysis process.
- Augment NC EdNET backbone as necessary to connect with secondary local service providers and residential ISPs.
- Coordinate backbone interconnection with secondary local service provides and residential ISPs
- Migrate eligible LEAs to NC EdNET backbone
- Perform capacity planning and NC EdNET backbone upgrades as necessary.

Year 3

- Work with remaining LEAs to meet E-Rate process requirements for E-Rate support for 2010-2011 school year connectivity upgrades. This includes any additional schools identified through the ongoing performance measurement and analysis process.

- Perform capacity planning and NC EdNET backbone upgrades as necessary.

Risks

Achieving the connectivity plan objectives will be contingent on mitigating the following risks and challenges:

LEA School connectivity - geographically dispersed sites, multiple carriers, lack of carrier interest, long-term contract commitments

Backbone Connectivity - economically connecting 30+ local access providers geographically dispersed through out North Carolina to the NC EdNET backbone

LEA Motivation/Cooperation – fostering collaboration between LEA personnel and NC EdNET team members to facilitate the connectivity upgrades

Navigate and manage political influences and the many State agencies and organizations involved in K-12 education and/or IT services.

Metrics

Specific metrics will be developed and reported against based on the outcome of the LEA data collection and analysis effort. Possible metrics include, but are not limited to, the following:

- School broadband connectivity - # connected schools
- Backbone connectivity - # local providers connected to the NCREN backbone
- Local provider service and interconnection contracts - # contracts
- End-to-end network performance – # schools included in performance measurement process
- End-to-end network performance – latency/response time and throughput

Budget

The NC EdNET defines network blueprints that specify the characteristics of last-mile provider network connectivity to schools and the characteristics of internal school local area networks. NC EdNET legislative funding supports the recurring costs of the last-mile provider network connectivity.

Connectivity Strategy Expenses	FY2006-07	FY2007-08	FY2008-09	FY2009-10
Operational Expenses:				
Staff				
Contracted Services				
Network Health Check [AT&T IBM]		\$ (1,000,000)		
Backbone Operations [MCNC]		\$ (1,000,000)	\$ (1,500,000)	\$ (2,000,000)
Supplies and Materials				
Travel				
Current Services				
Existing Connectivity [AT&T et al.]		\$ (16,155,997)	\$ (8,077,999)	
New Connectivity [AT&T et al.]		\$ (16,667,123)	\$ (33,334,246)	\$ (47,837,849)
Total Op Ex		\$ (34,823,121)	\$ (42,912,245)	\$ (49,837,849)
Capital (and other one-time) Expenses:				
NCREN Backbone Upgrades		\$ (5,300,000)		
Connectivity Pilots [4]	\$ (963,000)			
LEA equipment & wiring		\$ (4,406,073)		
Total Cap Ex		\$ (9,706,073)		
Totals	\$ (963,000)	\$ (44,529,194)	\$ (42,912,245)	\$ (49,837,849)

Strategy 2: Services

Services in the context of this Plan are comprised of Core and Value-Add services. Core services are required for sustained operation of highly reliable, high bandwidth backbone and local access networks. Value-Add services are offered to improve the operational efficiency within and among LEAs. Value-Add services will often leverage regional alliances to offer the consolidated delivery of common services to multiple LEAs

The list of services identified below is the culmination of multiple efforts. They include the LEA Site Surveys and interviews with LEA Tech Directors, conversations and meetings with peer states providing similar backbone service to K-12, and conversations with others having experience supporting highly reliable backbone networks.

Core services will be made available to all LEAs and will be provided on an opt-in basis. NC EdNET will be responsible for managing the development and delivery of the Core services. LEAs will assist in identifying and prioritizing the delivery of Core services. Value-Add services will also be made available to all LEAs and be provided on an opt-in basis. However, working groups comprised primarily of LEA representatives will be responsible for managing the development and delivery of these services. NC EdNET personnel will be responsible for facilitating the working group model and providing technical resources as necessary. These services may be deployed regionally or centrally. The working group concept is discussed further in the Organization and Collaboration Strategies.

Objectives:

Identify, prioritize and deploy the base set of Core Services that are required within the first year of backbone operation or at other significant milestones over the upcoming 3 years.

Create a list of candidates of Value-Add Services that will be offered to the LEA Advisory group for discussion and feedback. Deployment will begin later in year one and will continue as the LEA requirements dictate.

Explore landscape of approaches to deliver services in most effective and efficient manner possible. Use Advisory group to define both scope of service and desired outcomes.

Create a set of optional Value-Add services that each LEA Tech director can select based on the specific needs of their respective LEA.

Assumptions:

- Backbone provider will be NCREN
- Funding available for developing and supporting Core and Value-Add services
- Active participation in LEA Advisory groups
- Funding available to staff Network and E-rate Service bureaus
- Local Loop providers commitment to support our vision

Core Services

The following are the major categories of Core Services that may be provided by the NC EdNET organization. The actual availability of these services will be determined by the backbone provider and based on the specific needs of their customer base.

E-rate Service Bureau

School Connectivity Initiative support staff members will manage the filings and interactions with the federal E-rate program administered by the School and Libraries Division (SLD) of the Universal Service Access Corporation (USAC). Specifically, NC EdNET staff will support consortium filing at the state level for priority one (telecommunications and Internet access) services; provide training to LEAs for priority 2 (internal connections and maintenance) services; perform E-rate Program Integrity Insurance (PIA) review and assistance. The E-rate service bureau function provides centrally managed support to LEAs that ultimately provides for:

- more effective statewide E-rate filing;
- consistent access to E-rate discounts for all LEAs;
- consolidation of a set of processes now supported by LEAs independently;
- freeing local LEA resources to concentrate on instructional technology;
- eliminating inequities in E-rate access;
- minimizing (or eliminating all together) fees paid to external E-rate consultants.

Network Engineering

The NC EdNET also provides a centrally managed network engineering design and consulting service function. The role of this network engineering service bureau is to provide on-demand network connectivity expertise to LEAs. Specifically, NC EdNET network engineers support LEA network health assessments and troubleshooting to ensure that NC EdNET access is consistently provided down to the user (not simply to the edge of the school).

Operations

- WAN Network Performance monitoring
- WAN Problem Reporting/Troubleshooting
- Training for network appliances, tools and diagnostics
- Management of Vendors, Local Loop Providers and contracts

Collaboration Services

- Coordinate Regional Activities
 - Training
 - Sharing of best practices
- Moderated user groups
- Region specific services

Value-Add Services

The actual services to be provided will be determined with input from the LEA Advisory group beginning later in year 1. The following list is intended to provide a view of the type of services that can and may be offered and is not to be considered complete.

It is understood that a centralized model may be most cost effective to supply these services however it is recognized that certain services may be best delivered locally. In those cases a regional delivery model will be defined and implemented.

- **Network Engineering**
 - LAN Design and support
 - Co-location and Hosting
 - Application Testing
 - Managed Services
 - Firewall
 - Virus/Spam protection
 - Data Backups
 - Content Filtering
 - Storage Area Network (SAN)
 - Email
 - VPN-Telecommuting
- **Operations**
 - Application level Performance monitoring
 - Proactive Network Monitoring
 - Availability
 - LAN Problem Reporting/Troubleshooting
 - Training for new/emerging technologies
 - Network Tuning
 - Fault Isolation
 - Configuration Management
 - Change Management
- **Collaboration**
 - Host and Support

- Voice, Calendaring, Instant Messaging
- Newsgroups
- Conferencing
- E-Learning Portals

Deliverables

- Comprehensive set of ‘Core’ services to support reliable high bandwidth connectivity provided in year one.
- Set of ‘Advanced’ services offered to improve operational efficiencies (potentially fee based service)
- Realize Operational Efficiencies by leveraging alliances for common services
- Effective Advisory Groups represented by all stakeholders

Risks

- LEA Pushback on services definition
- Skilled resources not available to staff service bureaus

Budget

NC EdNET legislative funding supports the recurring costs associated with supporting services.

Services Strategy Expenses	FY2006-07	FY2007-08	FY2008-09	FY2009-10
Operational Expenses:				
<u>Staff</u>				
E-rate Staff [up to 7 FTE's]		\$ (477,978)	\$ (713,400)	\$ (713,400)
Engineering Staff [up to 7 FTE's]		\$ (619,920)	\$ (885,600)	\$ (885,600)
<u>Contracted Services</u>				
State Technology Plan [Gartner]		\$ (400,000)		
NC EdNet Operations Support		\$ (1,100,000)	\$ (2,200,000)	\$ (2,200,000)
<u>Supplies and Materials</u>				
<u>Travel</u>				
Administrative		\$ (25,000)	\$ (25,000)	\$ (25,000)
Outreach		\$ (100,000)	\$ (100,000)	\$ (100,000)
<u>Current Services</u>				
Total Op Ex		\$ (2,722,898)	\$ (3,924,000)	\$ (3,924,000)
Capital (and other one-time) Expenses:				
Total Cap Ex				
Totals	\$ -	\$ (2,722,898)	\$ (3,924,000)	\$ (3,924,000)

Strategy 3: Collaboration

From the initial Regional Report through this year’s more thorough review of successful education networks, a crucial element of this plan is community engagement, involvement and participation in every aspect of the NC K12 Connectivity Initiative

Networked Education vision. Although easily said, this strategy requires significant recurring process development and execution in order to gain and retain full community support, and participation without which the K12 network will not fully succeed. “Easy to say, hard to do.”

1. State/LEA/Region partnerships
 - a. Community engagement
 - b. Cooperative operating model
 - c. Distributed support model
2. Customer relationship management
3. LEA advisory and working groups
 - a. Identify LEA priorities
 - b. Develop list of core and advanced services
 - c. Fund distribution to LEAs
 - d. Identify “Regional Resources”
4. Identify and build “Networked Communities” as in the Networked Education concept chart.
 - a. Link communities with application tools and Network Access
 - i. Bridge the technology gap between tools/applications and network services/network infrastructure
 - ii. Identify and prioritize services, tools and applications
5. Coordinate with the services strategy, ranging from core services requiring little recurring support to optional consultative services that might be very regional in nature and highly dependent on community development.
 - a. Realize operational efficiencies by leveraging Regional Alliances for common services
 - b. Effective Advisory Groups represented by all stakeholders

Deliverables

Year 1:

- Continue LEA Focus Group Sessions
- Expand to representative work groups
- Build Advisory process and memberships
- Expand Connectivity website and determine “best home”
- Develop and sustain informed community and engagement

Year 2:

- Support Regional Services strategy through LEA defined requirements
 - Regular working group process
 - Regular regional community forums
- Evolve from Network Access to include discussions of Instructional and Administrative Access through advisory process and broader educational community stakeholder participation

Year 3:

- Build and support Regionalism, as IP Managed Services evolve in the network

Risks

None identified thus far.

Budget

Collaboration budget.

Collaboration Strategy Expenses	FY2006-07	FY2007-08	FY2008-09	FY2009-10
Operational Expenses:				
Staff				
Contracted Services				
Connectivity planning [Friday Institute]	\$ (430,927)			
Supplies and Materials				
Travel				
Outreach		\$ (100,000)	\$ (100,000)	\$ (100,000)
Current Services				
Total Op Ex		\$ (100,000)		
Capital (and other one-time) Expenses:				
Establish NCV		\$ (300,000)		
Total Cap Ex		\$ (300,000)		
Totals	\$ (430,927)	\$ (400,000)	\$ (100,000)	\$ (100,000)

Strategy 4: Organization

In order to build the most effective and efficient operating organization that supports the goals of the project we recommend that the NC EdNET operate under a 501c(3) not for profit umbrella Corporation. The organization and governance of the NC EdNET must:

1. Be sensitive to the NC public sector landscape and relevant NC statutes
2. Maintain acceptable relationships with service providers and customers in compliance with FCC E-rate guidelines
3. Support evolution towards an optimal model during the 3-year deployment period
4. Support LEA "local control"
5. Provide for closed loop accountability

Figure 6 illustrates a year one organizational framework that supports the goals of the School Connectivity Initiative while meeting the practical requirements listed above. MCNC provides a not for profit operating corporation that has provided network services to higher education in the state of North Carolina for over 20 years. MCNC manages relationships with last mile service providers that connect universities and colleges in the state to a common backbone operated as the NC Research and Education Network. MCNC also manages contracts with tier one national level Internet Service Providers in service to all of higher education and all of state government (NC ITS) in North Carolina.

The collective recommendation of the study groups is that MCNC administer the NC EdNET projects and programs based on the implementation and operating principles specified in this document. The State Board of Education serves as contract administrator with MCNC and provides a reporting interface between the NC EdNET and legislative oversight committees. NC Information Technology Services provides project management oversight for statewide contracts where appropriate. The NC EdNET

engages the Department of Public Instruction (DPI) and NC State University's Friday Institute for K12 technology project and program support.

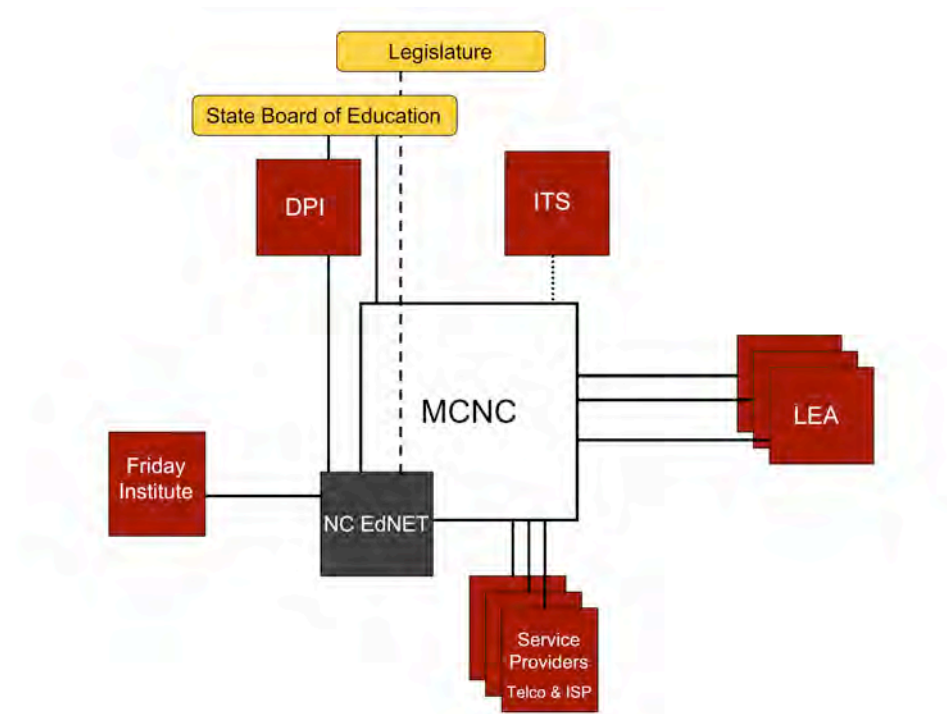


Figure 6 Year One Operating Model

The NC EdNET organization comprises a K12 connectivity project leader with administrative, engineering, E-rate, operations and outreach resources. Resources may include MCNC permanent or contract staff, contract staff from other state organizations (e.g., the Friday Institute), outsource service providers or consultants.

In the short-term (read 'year one'), it will be important to establish a liaison with relevant programs and commissions – for instance, with the E-Learning Commission, Learn and Earn Online, and 21st Century T&L Programs.

NC EdNET services are community-driven as facilitated through advisory groups. Advisory groups include:

- **Advisory Council** Goal: to engage the education constituencies and stakeholders served by the NC EdNET. Council members include senior staff in stakeholder organizations.
- **Technology Council** Goal: to engage representatives of the constituency at the planning and execution level. Council members include LEA technology directors, DPI technologists, program (e.g., NCVPS) technology decision makers and planners.

- **Application Council** Goal: to collaborate with those defining administrative and instructional applications for the 21st century. Council members include educators and program representatives from NCVPS, Learn and Earn Online, DPI NCWISE and on-line testing.

Deliverables

The State Board of Education shall identify a Project Leader to coordinate the development of the NC EdNET organization and services. The Project Leader shall:

- Establish contracts between DPI and the NC EdNET
- Establish a contract with MCNC to provide general and administrative services (e.g., purchasing, accounts payable, accounts receivable, human resources) to the NC EdNET organization
- Create an E-rate service center
- Create a network engineering service bureau
- Formalize and develop advisory interfaces (e.g., to BETA)
- Initiate and develop LEA councils and advisory structures
- Establish transitional governance through the Education Cabinet, and recommend a Board of Director structure and membership.
- Establish the mechanism for transitioning responsibility of connectivity funding (WAN payments) from the LEAs to the NC EdNET
- Establish training for LEA technicians
- Establish assessment program

The Project Leader shall coordinate the transitional work required to establish the NC EdNET as a platform for K-12 access. Specifically, the Project Leader shall direct transitional tasks as follows.

- Develop a new and comprehensive state technology plan aligned with the Joint Report, BETA reports, and e-Learning commission reports and SBE goals
- Execute network health assessments for all NC public schools by 6/30/08 against the Network Blueprint – including implementing best practice requirements and network tuning [AT&T and IBM are potential partners here]
- Write RFPs for last mile connectivity and related support services and file as E-rate 470 proposals no later than 12/1/07

Risks

Deliberations of stakeholder delays prompt action.

Budget

Organization budget – includes collaboration and organization costs.

Organization Strategy Expenses	FY2006-07	FY2007-08	FY2008-09	FY2009-10
Operational Expenses:				
Staff				
Project Leader (Friday Institute)		\$ (221,400)	\$ (221,400)	\$ (221,400)
Administrative Assistant		\$ (61,500)	\$ (64,575)	\$ (61,500)
Contracted Services				
General and Administrative [MCNC]		\$ (400,000)	\$ (600,000)	\$ (600,000)
Supplies and Materials				
Staff computing equipment		\$ (60,800)		
Miscellaneous		\$ (15,000)	\$ (15,000)	\$ (15,000)
Travel				
Administrative		\$ (25,000)	\$ (25,000)	\$ (25,000)
Current Services				
Total Op Ex		\$ (783,700)	\$ (925,975)	\$ (922,900)
Capital (and other one-time) Expenses:				
Total Cap Ex				
Totals	\$ -	\$ (783,700)	\$ (925,975)	\$ (922,900)

Strategy 5: Funding

The strategy to achieve sustainable funding through state, federal, private sector, and receipts-based sources, balanced against the defined NC EdNET connectivity and services will result in a sustainable K12 education network model. Key goals include:

- State funding for K12 connectivity will complement but not supplant LEA technology investments and programs
- Develop and implement partnerships that leverage public and private interests, expertise and resources
- Build a Sustainable model for funding and costs
- Demonstrate fiscal responsibility by balancing funding, costs and functionality, for optimal effectiveness and efficiency
- Leverage existing resources to minimize duplication and utilize resources for optimal productivity
- Coordinate with key Implementation Plan cost components of Connectivity, Services, and Organization Strategies.
- Minimize e-Rate float exposure

As summarized in Figure 2 NC EdNET Connectivity Blueprint on page13, this detailed budget presentation reflects current estimates from prior year work and the 2007 Connectivity Initiative Team study results to date. More current and complete detail will be addressed in the next few months as an interim project is initiated.

In this plan we categorize expenses around operational strategies – specifically, connectivity, services, collaboration, and organization. Further, the last category is the sum of collaboration and organization expenses. Table 4 provides a summary of the total expenses across connectivity, services, and collaboration and organization³.

³ Totals in this cost summary vary slightly from the *Developing Regional Education Networks* report as we have added Golden Leaf funding and re-allocated some expenses due to the non-recurring appropriation under which the School Connectivity Initiative planning project is funded.

Table 4 School Connectivity 3-Year Cost Summary

	Year 1	Year 2	Year 3
Connectivity	44,529,194	42,912,245	49,837,849
Services	2,722,898	3,924,000	3,924,000
Collaboration and organization	1,538,700	1,025,975	1,022,900
Totals	48,835,792	47,862,220	54,784,749

After applying E-rate discount credits and Golden Leaf grant funding (totaling \$24M in years one and two and \$30M in year 3) to connectivity expenses we see a summary representation of expenses to be funded by state appropriation that totals \$24M (rounded) per year as indicated in Table 5.

Table 5 School Connectivity 3-year Cost After Credits

	Year 1	Year 2	Year 3
Connectivity	20,213,874	19,156,493	19,148,558
Services	2,722,898	3,924,000	3,924,000
Collaboration and organization	1,538,700	1,025,975	1,022,900
Totals	24,520,472	24,106,468	24,095,458

Figure 5 shows year-3 distribution of expenses after E-rate and Golden Leaf connectivity credits. That is, the distribution of state appropriated monies across connectivity, services, and collaboration and organization line items. This represents a highly efficient organization with low overhead costs (4%). Note that year one collaboration and organization costs are somewhat higher (\$1,538,700 versus \$1,022,900) as there are start-up costs – though in year 1 the total contribution of these administrative costs is still only 7% (of \$24M).

**Figure 7 Steady State Cost Distribution**

Deliverables

Risks

E-rate changes or goes away.

State funding changes or goes away.

Budget

The draft budget presented here reflects the full plan as specified in this document.

K-12 School Connectivity Pro Forma, Fully Funded 3-Year View (all numbers rounded to the nearest thousand)

	FY2006-07	FY2007-08	FY2008-09	FY2009-10
Funding:				
e-Rate Reimbursements		\$ 19,309,246	\$ 23,355,752	\$ 30,289,291
GoldenLeaf Grant		\$ 400,000	\$ 400,000	\$ 400,000
School Connectivity Carryover		\$ 4,606,073		
Cisco Fellow Grant	\$ 200,000	\$ 200,000		
MCNC Backbone upgrade in-kind				
Non-recurring Appropriation	\$ 6,000,000			
Recurring Appropriation		\$ 24,000,000	\$ 24,000,000	\$ 24,000,000
Total Funding		\$ 48,515,319	\$ 47,755,752	\$ 54,689,291
Operational Expenses:				
<u>Staff</u>				
Project Leader (Friday Institute)		\$ (221,400)	\$ (221,400)	\$ (221,400)
Administrative Assistant		\$ (61,500)	\$ (64,575)	\$ (61,500)
E-rate Staff [up to 7 FTE's]		\$ (477,978)	\$ (713,400)	\$ (713,400)
Engineering Staff [up to 7 FTE's]		\$ (619,920)	\$ (885,600)	\$ (885,600)
<u>Contracted Services</u>				
Connectivity planning [Friday Institute]	\$ (430,927)			
Project Management	\$ (200,000)	\$ (200,000)		
General and Administrative [MCNC]		\$ (400,000)	\$ (600,000)	\$ (600,000)
State Technology Plan [Gartner]		\$ (400,000)		
Network Health Check [AT&T IBM]		\$ (1,000,000)		
NC EdNet Operations Support		\$ (1,100,000)	\$ (2,200,000)	\$ (2,200,000)
Backbone Operations [MCNC]		\$ (1,000,000)	\$ (1,500,000)	\$ (2,000,000)
<u>Supplies and Materials</u>				
Staff computing equipment		\$ (60,800)		
Miscellaneous		\$ (15,000)	\$ (15,000)	\$ (15,000)
<u>Travel</u>				
Administrative		\$ (25,000)	\$ (25,000)	\$ (25,000)
Outreach		\$ (100,000)	\$ (100,000)	\$ (100,000)
<u>Current Services</u>				
Existing Connectivity [AT&T et al.]		\$ (16,155,997)	\$ (8,077,999)	
New Connectivity [AT&T et al.]		\$ (16,667,123)	\$ (33,334,246)	\$(47,837,849)
Total Op Ex		\$ (38,504,719)	\$ (47,737,220)	\$ (54,659,749)
Capital (and other one-time) Expenses:				
NCREN Backbone Upgrades		\$ (5,300,000)		
Connectivity Pilots [4]	\$ (963,000)			
Establish NCV		\$ (300,000)		
LEA equipment & wiring		\$ (4,406,073)		
Total Cap Ex		\$ (10,006,073)		
Net Income (Loss)	\$ 4,606,073	\$ 4,528	\$ 18,532	\$ 29,542

Appendices

Appendix A – Pilot Project Summaries

Roanoke River Valley Consortium	Warren County, North Hampton County, Weldon City, Halifax County, Bertie County, Hertford County
Project Summary	Network engineering, project management, internal wiring, network routing equipment
Connectivity project lead	John Bass, Centennial Networking Lab, NCSU
Recommended Pilot Support Commitment	\$12,000 for internal wiring and routing equipment
Partners	USDA, ITS, DPI, Embarq, e-NC, Golden Leaf Foundation, Friday Institute, MCNC
Instructional Outputs	The video conferencing solution will be used to support sharing of instructors across LEAs, to access live content (e.g., sourced by the NC School of Science and Math), and for online professional development
Funding Summary	Pilot: \$12,000 [NR] Connectivity: Covered by Golden Leaf through FY2009-2010 to a maximum of \$2M
WinstonNet Consortium	Davidson County, Davie County, Elkin City, Lexington City, Mount Airy City, Stokes County, Surry County, Thomasville City, Yadkin County
Project Summary	Shared computing services, virtual computing, thin client
Connectivity project lead	Phil Emer, Friday Institute, NCSU
Recommended Pilot Support Commitment	Up to \$200,000 for virtual computing cluster demonstration site
Partners	WinstonNet, IBM, NCSU Virtual Computing Lab (VCL), Time Warner Cable, Wake Forest University, Golden Leaf Foundation, Friday Institute, MCNC
Instructional Outputs	Regional sharing of compute, storage, application, software licensing, and human resources – particularly in support of instructional software and tools
Funding Summary	Pilot: \$200,000 [NR]

	Connectivity: \$97,000 [R]
Wilson County One-to-One	Wilson County
Project Summary	Network engineering, wireless local area network infrastructure, internal wiring
Connectivity project lead	Todd Broucksou, MCNC
Recommended Pilot Support Commitment	\$130,000 for wireless LAN equipment and internal wiring ⁴
Partners	SAS, Cisco, Time Warner Cable, Friday Institute, MCNC
Instructional Outputs	Large scale delivery of online content universally – leveraging a managed 1-to-1 computing paradigm. Also developing distinct “computer images” and curriculum to support emerging Hunt HS “academies” (and project-based learning.
Funding Summary	Pilot: \$130,000 [NR] Connectivity: \$88,000 [R]
WNC EdNET Consortium	Cherokee County, Cherokee Central Tribal, Clay County, Graham County, Jackson County, Macon County, Swain County
Project Summary	Network engineering, wide area network fiber connectivity
Connectivity project lead	Charlie Pittman, e-NC Authority
Recommended Pilot Support Commitment	\$621,000 for fiber IRUs to connect remaining Cherokee County Schools
Partners	Golden Leaf Foundation, e-NC Authority, Cherokee Preservation Foundation, Balsam West FiberNet, Blue Ridge Mountain EMC, Appalachian Regional Commission, MCNC
Instructional Outputs	Regional delivery of high definition rich media content. Tight coupling of K-12, community college, and university (WCU) as regional collaborators and content providers to an education enterprise. Virtual presence as a realistic interactive delivery model.
Funding Summary	Pilot: \$621,000 [NR] Connectivity: TBD [R]

⁴ Cisco may provide an equipment grant that would cover up to \$100K of this amount.

Appendix B. State Education Network Peer Review

“Consumer Report” table (Awaiting Dave Frye’s updated spreadsheet of populated information)

Peers versus similarities to North Carolina Requirements
Scale 1 to 10 (1 is not similar; 10 is almost identical)

State Education Network Peer Review Comments and Recommendations:

Connectivity			Customers				Funding		Organization		Demographics			
State	BB	Local Loop	Univ	K-12	Lib	CC	State Govt	State funding	Fee Based	Entity	Governance	School districts	No. of schools	No. of students
NC	X	X		X				Yes	TBD	501c(3)	BOD	115	2302	1.4m
MO	BB to LEA CO	NA	X	X	X	X	X	Yes	Yes	Univ Dept	Advisory Board	532	2383	905k
MI	BB to Regional Pops	NA	X	X	X		X	No	Yes	501c(3)	BOD	835	4155	1.7m
UT	X	X	X	Secondary only			X	Yes	No	Univ Entity	Steering Committee	84	950	504k
WI	Provides layer 3 services over Badgernet BB		X	X	X	X		No	Yes	Coop	Advisory Board	461	2309	865k
CA	BB to LEA CO	NA	X	X		X		Yes	Yes	501c(3)	Board + advisory council	1140	9851	6.4m
TN	X	X		X				Yes	Yes	ENA contractor to LEA Consortium	LEA Consortium	136	1726	941k
KS	BB to LEA CO	NA	X	X	X		X	Yes	Yes	State agency	Univ	309	1429	469k

Top level peer recommendation:

“The best end result is an evolutionary process resulting in an effective and efficient steady state K-20 Network.”

Assumption: 50% of the final Network will be unique to North Carolina—influences and circumstances (political, economic and other specifics), while the other 50% can be mapped with other state best practices and models

Key supporting elements contributing to a preferred steady state K20 network:

1. Collaboration with the broad community—consistent and engaging at every level and phase—results in the optimum network. Practices recommended include:

- Empower and develop evangelists e.g., working groups
- Leverage every opportunity and potential interaction between Higher Ed & K12.
- Engage and involve all State agencies
- Governance (Board of Directors) representation should reflect the customer base and financial model
- Broad based Advisory process is required to represent, reflect constituents.
- Carriers –friendly alliances, state wide and locally are essential to success
- Proactive Customer Relationship Management principles are essential.
“Connecting people/connecting strategies”

2. Organizational solution

- Accelerated start – infrastructure, Services
- Leverage existing organization strengths, particularly those trusted and with solid reputation.
- NCeNet should be a K-20 educational network, not commercial network
- K12 should be connected to NCREN
- NCeNet should be a not for profit corporation

4. SLA for K12 system incremental approach

5. Funding

- Consider a funding model with all having – “skin in the game.”
 - Fees should not be usage based (disincentive)
 - Fees for value-add services
 - Define a sustainable model for introducing fees: use advisory process to steady state
 - Not usage based
 - De-emphasize E-rate in defining sustainable model.
 - Ignore recouping backbone expenses thru E-rate
- Frontload capital expenditures early in NC EdNET’s life because state political commitment may wane.
- Matching dollar phenomena: Partner with other sources. Example: Fiber deployment in last mile for “have nots” – leverage Golden Leaf, NC K-12 connectivity, county & carrier money
- Don’t let funding drive the plan

6. Steady state model

- Incremental process; plan accordingly
- Find areas for quick wins early
- Crisp definition & delivery timelines of core versus value services
- Validate “networked education chart” – as network access matures, natural migration is to move toward tools, content, applications (up the stack)

7. Leadership

The Executive Director position is extremely important

- Define qualifications & requirements - balance leadership vs operational skills
- Fill position early and with qualified candidate

Appendix C. State Network e-Rate leadership peer review

Participants:

Gary Rawson, Mississippi E-Rate Coordinator and SECA Leader

Tom Bayersdorfer, Tennessee Consortium Coordinator

Greg Weisiger, Virginia, E-Rate Coordinator

Dan Farslow, Ohio, E-Rate Coordinator

Win Himsworth, E-Rate Central, NY contract provider

George McDonald, E-Rate Central, DC, contract provider

State Peers	State coordinator/staff	State or other consortium	State filing: 470, 471, none	Training and support to LEAs		
Mississippi	Coordinator	State	Yes	Yes		
Tennessee	No	Consortium	Yes	Yes		
Virginia	Coordinator	LEAs	None	Yes		
Ohio	Coordinator & team	State	Yes	Yes		
New York	Contracted Coord.	LEAs	No	Yes		

Recommendations and best practices from guest experts:

1. Leaders have a single, knowledgeable statewide resource. However, there is vulnerability without a backup.
2. Assuming #1, then the more centralized, the higher the quality of filing results.
 - a. Results in higher yield
 - b. Provides better training
 - c. Creates better carrier confidence and leads to willingness to carry the float.
3. Outsourcing is a legitimate option.
 - a. Provides subject matter expertise
 - b. Provides full time focus
 - c. Provides broader knowledge base
4. The group prefers consortiums.
5. The group helped define and refine a procedure to leverage MCNC without compromising e-Rate monies

Appendix D. Findings

LEA site surveys

Data Analysis

Connectivity

E-Rate

Services offerings: Gathered from LEA site surveys, other State Education Networks, Connectivity Team

Set of core and optional services

Services	Core	Value Added
Engineering:	<ul style="list-style-type: none"> • Technical consulting <ul style="list-style-type: none"> ○ WAN Design ○ Guidance and consulting ○ Network security ○ WAN/LAN Health Assessments (i.e. NDT like tools) 	<ul style="list-style-type: none"> • LAN design and Support • Co-location Hosting • Applications Testing • Technical Consulting <ul style="list-style-type: none"> ○ Network service-LAN ○ Application testing ○ Trouble shooting • Managed Application and Web Services <ul style="list-style-type: none"> ○ Firewall ○ Virus protection/spam ○ Content filtering ○ Data Backups ○ Storage Area Networking ○ Email ○ Video conferencing ○ Internet access (optional) ○ VPN-telecommuting
Operations	<ul style="list-style-type: none"> • WAN Network performance monitoring and measuring • WAN Problem Reporting (trouble shooting) • Training-use of: <ul style="list-style-type: none"> ○ Network appliances & tools ○ Diagnostics • Management of: <ul style="list-style-type: none"> ○ Vendors and Local Loop Providers ○ Contracts 	<ul style="list-style-type: none"> • Application level Performance Monitoring • Proactive Performance Monitoring <ul style="list-style-type: none"> ○ Availability • LAN Problem Reporting/Troubleshooting • Training for new/emerging technologies • Network Tuning • Fault Isolation • Configuration Management • Change Management

E-Rate	<ul style="list-style-type: none"> • Data gathering • Consortium filing at state level for LEAs P1 • Support and training to LEAs for P2 • PIA review and assistance 	<ul style="list-style-type: none"> •
Collaboration	<ul style="list-style-type: none"> • Coordinate Regional activities <ul style="list-style-type: none"> ○ Training ○ Sharing of best practices) • Moderated User Groups • Region Specific Services 	<ul style="list-style-type: none"> • Host and Support <ul style="list-style-type: none"> ○ Voice, Video, Calendaring and Instant Messaging ○ Newsgroups ○ Conferencing Tools ○ E-Learning tools (portals)

Project Status Report



Project Status Report

Reporting Date: 1/14/2008

Project - **Statewide Network Connectivity**

Snapshot Name - December 2007

Project Scope	DPI-PM: 12/18/07; I have made additional adjustments to Cost/Benefit projections based on the E-Rate Director savings projections and projected cost of Backbone support. These numbers will be more clear at the end of year 1 as statewide support contracts are finalized.
	EPMOQA: 12/28/07: The project expects full-function scope delivery.
Phase Milestones	EPMOQA: 12/28/07: The project has provided Planning and Design phase milestones and key project deliverables.
Project Staff Utilization	DPI-PM 11/16/07: Phase to date and actual hours are accurate and align with Financials and staff plan/pony blanket.
	EPMOQA: 12/28/07: The project is within the staff resource utilization plan in hours project to date (zero (0) variance).
Project Issue and Risk Management	DPI-PM: 10/14/07: School Connectivity primary objective is to transfer the cost of network connectivity from LEA budgeting to State IT budgeting. This will allow for one common NC Education Network (NCEdNet). By establishing one common network there are more opportunities to leverage shared services and reduced connectivity cost statewide. This is only 1 of 4 SCI projects. The 3 other projects are pending RFP & contracts pending with The Friday Institute. The EPMO PMA is planning a meeting between DPI/ITS/Friday Institute to finalize ITS support and O&M planning of the common network. Date is TBD. I will respond to the issues once all vendors and tasks are identified.
	EPMOQA: 12/28/07: The project has provided corrective action plans for all identified issues.
Monthly Status Reporting	EPMOQA: 12/28/07: Project status reporting is current.

Project Information Section			
Project Name	Statewide Network Connectivity		
Start Date	8/2/2007	End Date	6/30/2008
Creation Date	7/29/2007	Workflow Status	Gate 2 State Approval
Fixed Start Date		Fixed End Date	
Benefits Start Date	6/30/2008	Capitalization Months	60
Project ID	DPI0769	Priority	
Project Range	\$500,000 - \$3,000,000	Proj. Range Level of Confidence	75-100%
Type of Project	Infrastructure	Budget Code	08015321501000101081



Project Status Report

Reporting Date: 1/14/2008

Project - U&Q [| / O [] } } ^ & c a ~ Á Q a a a ~ ^ Á Ö € Á Á Ö • c a | a @ Á SFG Á { { [] Á ^ ç [\

Snapshot Name - December 2007

Project Information Section

Initiation Phase Cost	4663	Planning Phase Cost	428468
Department or Agency	Public Instruction, Department of	Project Manager Telephone	919-807-3308
Division	Technology & Information Services	Project Security Contact	Alexis Bouchard
Project Manager Name	Jerry Bunn	Project Sponsor Organization	NCDPI
Project Manager Email	Jbunn@DPI.state.nc.us	Project Sponsor	Ed Chase

Initiation Phase

Project Definition

Project Goals	The Project goals in Year One are: Connect 80% of the 115 LEA's to the education newtwork Complete 33% of the 2400 K12 schools LAN assessments Establish Nework Monitoring for 33% of the 2400 K12 schools Connect 25% of the K12 Schools to the LEA hub Deploy 4 approved Connectivity Pilots which includes 23 LEA's
Project Deliverables	"ÁÚ [ç a ^ Á S O E Á e • ^ • { ^ } Á ^ • o É a a ~ • a É a Á Á & { { ^ } a a a } • Á : Á & Q [/ O [] } } ^ & c a ~ Á Q \ { ^ } c a a } É "Á Ö ^ [^ Á Á a } : ç ^ a Á O [] } } ^ & c a ~ Á Ú a o Á @ @ & { } • a o Á - Á H S O O E Á ç ^ Á a o Á Á [• ^ a Á d a e ^ ^ D "Á Ö • c a a @ Á c a e , a ~ / S e a a : Á & { } d a s o Á : Á & a Á s & • • B Á ç Á & { } } ^ & c a } É ^ Á ! á * "Á Ö • c a a @ & { { [] Á ^ : ç a Á Á ^ ç ^ Á s e ^ ^ { ^ } o Á a o Á a o Á Á Á ^ : ç a Á Á : ç a Á ^ • "Á Á * a a Á Á O E • Á - Á } a Á ^ • ^ : ç ^ a Á S O O E Á @ ^ Á Á a e a ^ Á e Á a } c a a Á Á Á o Á S O E Á P ^ a o Á O E • ^ • • { ^ } o "Á Á * a a Á Á o Á a ~ & a a } Á ^ ç [\ Á e Á ^ & • • a ~ Á Á ç Á & { } } ^ & c a } a o Á & a Á ^ : ç a Á Á : ç a Á ^ • É a o Á S O O E Á Ú • É a a Á ^ • a ~ } c a a Á Ú • a a Á a } • a a } Á S O O E Á Á o Á Á a ~ & a a } Á ^ ç [\ Á @ ^ Á Á a e a ^ "Á Ö ^ ç ^ [Á a Á Á ^ Á a ~ • c a a a Á Á ^ a e ~ ^ { ^ } o Á : & • • Á : Á Á a } á * ~ Á a Á ^ Á a a ^ Á ^ : { a } & ^ Á a } • a Á - Á & Q [& { } } ^ & c a ~ Á

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Snapshot Name - December 2007

Initiation Phase

[illegible]



Project Status Report

Reporting Date: 1/14/2008

Project - **NC EdNET**

Snapshot Name - December 2007

Initiation Phase

Project Organization and Roles	<p>Peter Asmar, NCDPI CIO</p> <p>Frances Bradburn, Director, Instructional Technology Division, NCDPI</p> <p>Annemarie Timmerman, DPI Regional Technology Consultant, Business Subject Matter Expert</p> <p>Mary Lou Daily, DPI Regional Technology Consultant, Business Subject Matter Expert</p> <p>Kerry Mebane, DPI Regional Technology Consultant, Business Subject Matter Expert</p> <p>Melanie Honeycutt, DPI Regional Technology Consultant, Business Subject Matter Expert</p> <p>Acacia Dixon, DPI Regional Technology Consultant, Business Subject Matter Expert</p> <p>Annette Murphy, NCDPI PMO</p> <p>Jerry Bunn, NCDPI Project Manager</p> <p>Plil Emer, Managing Director, Friday Institute</p> <p>Technical Project Team Partners</p> <ul style="list-style-type: none">-- NC EdNET-- NCREN-- NC Wise-- NC ITS-- MCNC <p>NCDPI -- will co-manage all aspects of the project with FI -- NC State University/NCREL/Project Tomorrow -- the Friday Institute for Educational Innovation</p> <p>Possible Last Mile Connectivity Partners</p> <ul style="list-style-type: none">-- AT&T-- Embarq-- Time Warner Cable <p>Stakeholders representing the LEAs and public schools:</p> <ul style="list-style-type: none">-- Teachers-- Students-- Parents-- Instructional Technology Coordinators-- Principals-- Deputy Superintendent of Instruction
--------------------------------	--

Planning and Design Phase

Agency Document Checklist			
Select the artifacts this project will or will not be producing:			
Project Plan	Yes	Work Breakdown Structure (WBS)	Yes
Staffing Plan	Yes	Business Reqs Documented	Yes



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Planning and Design Phase

Communication Plan	Yes	Hardware & Software Procurement	N/A
Change Management Plan	Yes	Training Plan	N/A
Project Test Plan	Yes	Deployment/Rollout Plan	Yes
Acceptance Criteria	Yes	Risk Management Plan	Yes
Data Conversion/Migration Plan		Project Quality Assurance Plan	N/A
Statement of Work (SOW)	Yes	Configuration Management Plan	Yes

Execution and Build Phase

Agency Document Checklist

Select the artifacts this project will or will not be producing:

System Integration Plan		Test and Acceptance Results	Yes
Pilot Results	Yes	Change Management Plan	Yes
Disaster Recovery/Business Continuity Plan	Yes	Operations & Maintenance Transition Plan	N/A



Project Status Report

Reporting Date: 1/14/2008

Project - U&Q [I/O] } ^ & c a Q a a c ^ A Y E A A O c a | a Q a SFG A [{ { [] } A ^ c [\

Snapshot Name - December 2007

Project Status Attributes			
Overall Project Hours Cost			
Project Month Actual Hours	2120	Project Month Plan Hours	2120
Project to Date Actual Hours	4745	Project to Date Plan Hours	4745
Project to Date Variance Hours	0.00 %		
Planning and Design Phase Cost			
Hours			
Phase Month Actual Hours	753	Estimate to Complete Phase Hours	0
Phase Month Plan Hours	753	Total Phase Estimated Hours	3,378
Phase To Date Actual Hours	3,378	Total Approved Phase Hours	3,378
Phase To Date Plan Hours	3,378	Phase Variance Percentage Hours	0.00 %
Dollars			
Estimate to Complete Phase Dollars	0	Total Approved Phase Budget Dollars	428,468
Phase Variance Percentage Dollars	0.00 %		
Execution and Build Phase Cost			
Hours			
Phase Month Actual Hours	1,367	Estimate to Complete Phase Hours	3,511
Phase Month Plan Hours	1,367	Total Phase Estimated Hours	4,878
Phase to Date Actual Hours	1,367	Total Approved Phase Hours	4,878
Phase to Date Plan Hours	1,367	Phase Variance Percentage Hours	0.00 %
Dollars			
Estimate to Complete Phase Dollars	461,882	Total Approved Phase Budget Dollars	640,727
Phase Variance Percentage Dollars	0.00 %		
Implementation Phase Cost			
Hours			
Phase Month Actual Hours		Estimate to Complete Phase Hours	2,478



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Phase Month Plan Hours		Total Phase Estimated Hours	2,478
Phase to Date Actual Hours		Total Approved Phase Hours	2,478
Phase to Date Plan Hours		Phase Variance Percentage Hours	0.00 %
Dollars			
Estimate to Complete Phase Dollars	328,720	Total Approved Phase Budget Dollars	328,720
Phase Variance Percentage Dollars	0.00 %		
Project Closeout Phase Cost			
Hours			
Phase Month Actual Hours		Estimate to Complete Phase Hours	43
Phase Month Plan Hours		Total Phase Estimated Hours	43
Phase To Date Actual Hours		Total Approved Phase Hours	43
Phase To Date Plan Hours		Phase Variance Percentage Hours	0.00 %
Dollars			
Estimate to Complete Phase Dollars	2040	Total Approved Phase Budget Dollars	2232
Phase Variance Percentage Dollars	-8.60 %		
Business Functional Requirements (Scope)			
Original Number Business Functional Requirements:	7		
Total Number of Submitted Changes:			
Total Number of Approved Changes:			
Current Number Business Functional Requirements:	7		
Will all business functional requirements be delivered?	Yes		
Project Status Report Step			
Accomplishments this Period			



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

December 2007

- Moved to Execution & Build phase
- Posted Communications Plan
- Posted Change Management Plan
- Continued Integration testing with ITS existing tool sets with Network Performance Monitoring Tool.
- Completed final 2 fiber terminations for WinstonNet Consortium
- Began defining shared services for WinstonNet consortium LEA's relative to E-Rate

Plans for Next Period

January 2008 planned efforts

- Submit E-rate 471's for backbone connections
- Transition to new contracts with AT&T, Embarq, Time Warner Cable and others for backbone connections
- Initiate scheduling of backbone connection provisioning and turn-on connections between NCREN and LMP's
- Prepare and submit connectivity report to legislative oversight offices as specified in the special provisions of the appropriation
- Continue to Initiate distribution of LEA funding allocations



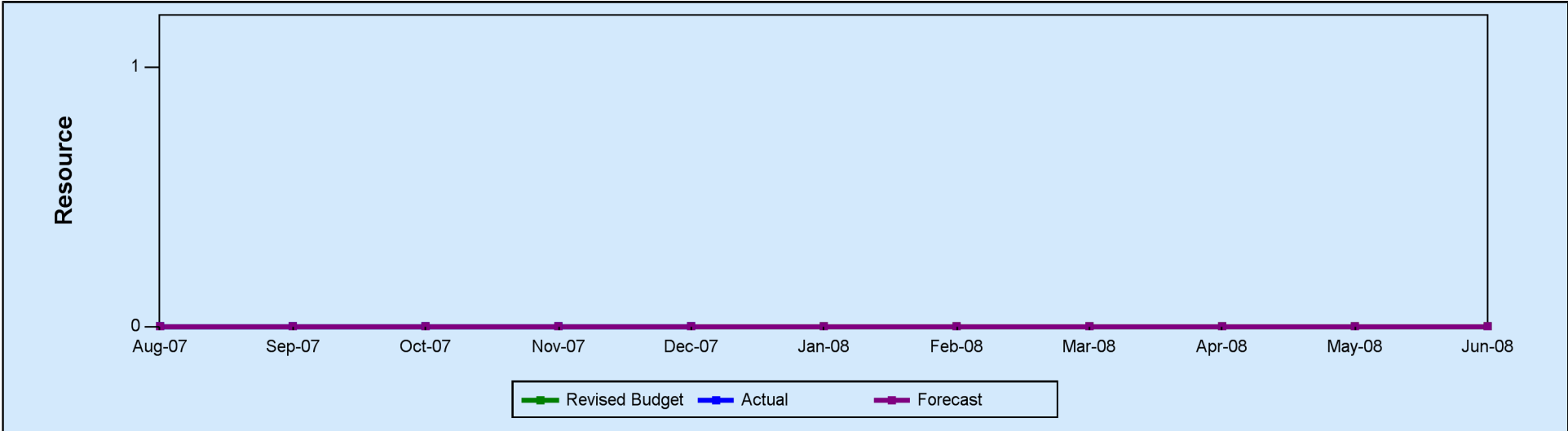
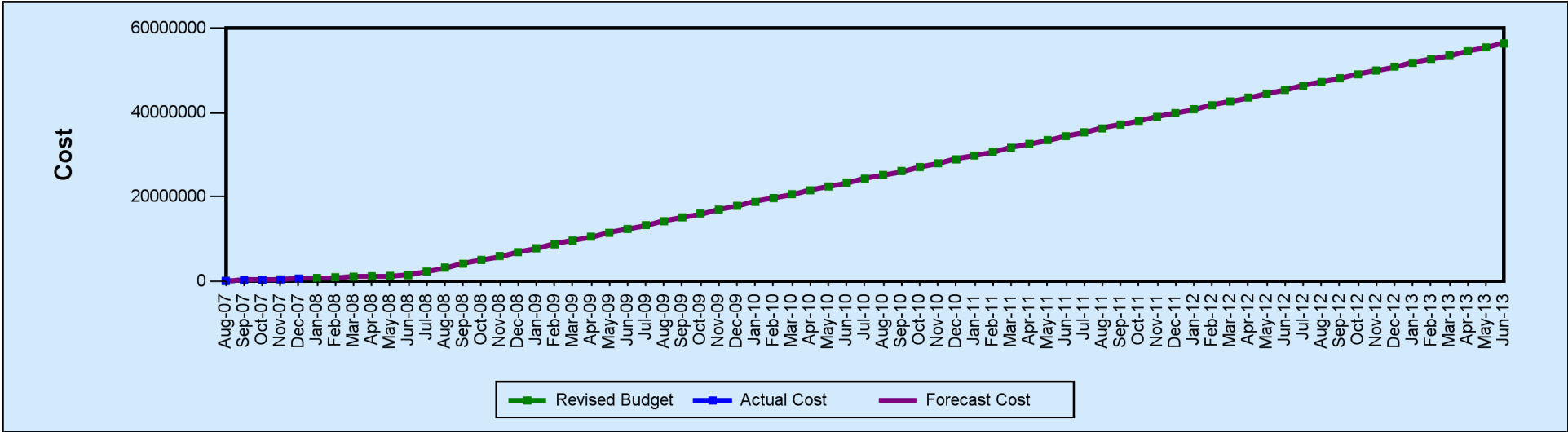
Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Trend Analysis





Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Cost Break Down													
Levels	Revised Budget					Actual Cost			Forecast Cost				
	Dec-2007	YTD	To Date	2008	TC	Dec-2007	YTD	TC	Dec-2007	YTD	To Date	2008	TC
Total Investment Cost	\$ 178,845	\$ 611,976	\$ 611,976	\$ 1,404,618	\$ 56,404,618	\$ 178,845	\$ 611,976	\$ 611,976	\$ 178,845	\$ 611,976	\$ 611,976	\$ 1,404,618	\$ 56,404,618
Project Costs	\$ 178,845	\$ 611,976	\$ 611,976	\$ 1,404,618	\$ 1,404,618	\$ 178,845	\$ 611,976	\$ 611,976	\$ 178,845	\$ 611,976	\$ 611,976	\$ 1,404,618	\$ 1,404,618
Initiation	\$ 0	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 0	\$ 4,663	\$ 4,663	\$ 0	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663
Internal Personnel	\$ 0	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663	\$ 0	\$ 4,663	\$ 4,663	\$ 0	\$ 4,663	\$ 4,663	\$ 4,663	\$ 4,663
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Planning & Design	\$ 0	\$ 428,468	\$ 428,468	\$ 428,468	\$ 428,468	\$ 0	\$ 428,468	\$ 428,468	\$ 0	\$ 428,468	\$ 428,468	\$ 428,468	\$ 428,468
Internal Personnel	\$ 0	\$ 12,962	\$ 12,962	\$ 12,962	\$ 12,962	\$ 0	\$ 12,962	\$ 12,962	\$ 0	\$ 12,962	\$ 12,962	\$ 12,962	\$ 12,962
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 0	\$ 391,864	\$ 391,864	\$ 391,864	\$ 391,864	\$ 0	\$ 391,864	\$ 391,864	\$ 0	\$ 391,864	\$ 391,864	\$ 391,864	\$ 391,864
Other External Costs	\$ 0	\$ 23,642	\$ 23,642	\$ 23,642	\$ 23,642	\$ 0	\$ 23,642	\$ 23,642	\$ 0	\$ 23,642	\$ 23,642	\$ 23,642	\$ 23,642
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Execution & Build	\$ 178,845	\$ 178,845	\$ 178,845	\$ 640,727	\$ 640,727	\$ 178,845	\$ 178,845	\$ 178,845	\$ 178,845	\$ 178,845	\$ 178,845	\$ 640,727	\$ 640,727
Internal Personnel	\$ 3,997	\$ 3,997	\$ 3,997	\$ 15,988	\$ 15,988	\$ 3,997	\$ 3,997	\$ 3,997	\$ 3,997	\$ 3,997	\$ 3,997	\$ 15,988	\$ 15,988
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Cost Break Down													
Levels	Revised Budget					Actual Cost			Forecast Cost				
	Dec-2007	YTD	To Date	2008	TC	Dec-2007	YTD	TC	Dec-2007	YTD	To Date	2008	TC
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 161,606	\$ 161,606	\$ 161,606	\$ 572,511	\$ 572,511	\$ 161,606	\$ 161,606	\$ 161,606	\$ 161,606	\$ 161,606	\$ 161,606	\$ 572,511	\$ 572,511
Other External Costs	\$ 13,242	\$ 13,242	\$ 13,242	\$ 52,228	\$ 52,228	\$ 13,242	\$ 13,242	\$ 13,242	\$ 13,242	\$ 13,242	\$ 13,242	\$ 52,228	\$ 52,228
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Implementation	\$ 0	\$ 0	\$ 0	\$ 328,720	\$ 328,720	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 328,720	\$ 328,720
Internal Personnel	\$ 0	\$ 0	\$ 0	\$ 9,937	\$ 9,937	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 9,937	\$ 9,937
External Personnel	\$ 0	\$ 0	\$ 0	\$ 286,883	\$ 286,883	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 286,883	\$ 286,883
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 31,900	\$ 31,900	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 31,900	\$ 31,900
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Project Closeout	\$ 0	\$ 0	\$ 0	\$ 2,040	\$ 2,040	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 2,040	\$ 2,040
Internal Personnel	\$ 0	\$ 0	\$ 0	\$ 2,040	\$ 2,040	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 2,040	\$ 2,040
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Investment Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 55,000,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 55,000,000



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Cost Break Down													
Levels	Revised Budget					Actual Cost			Forecast Cost				
	Dec-2007	YTD	To Date	2008	TC	Dec-2007	YTD	TC	Dec-2007	YTD	To Date	2008	TC
Operations & Maintenance	\$ 0	\$ 0	\$ 0	\$ 0	\$ 55,000,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 55,000,000
Internal Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 9,500,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 9,500,000
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 45,500,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 45,500,000



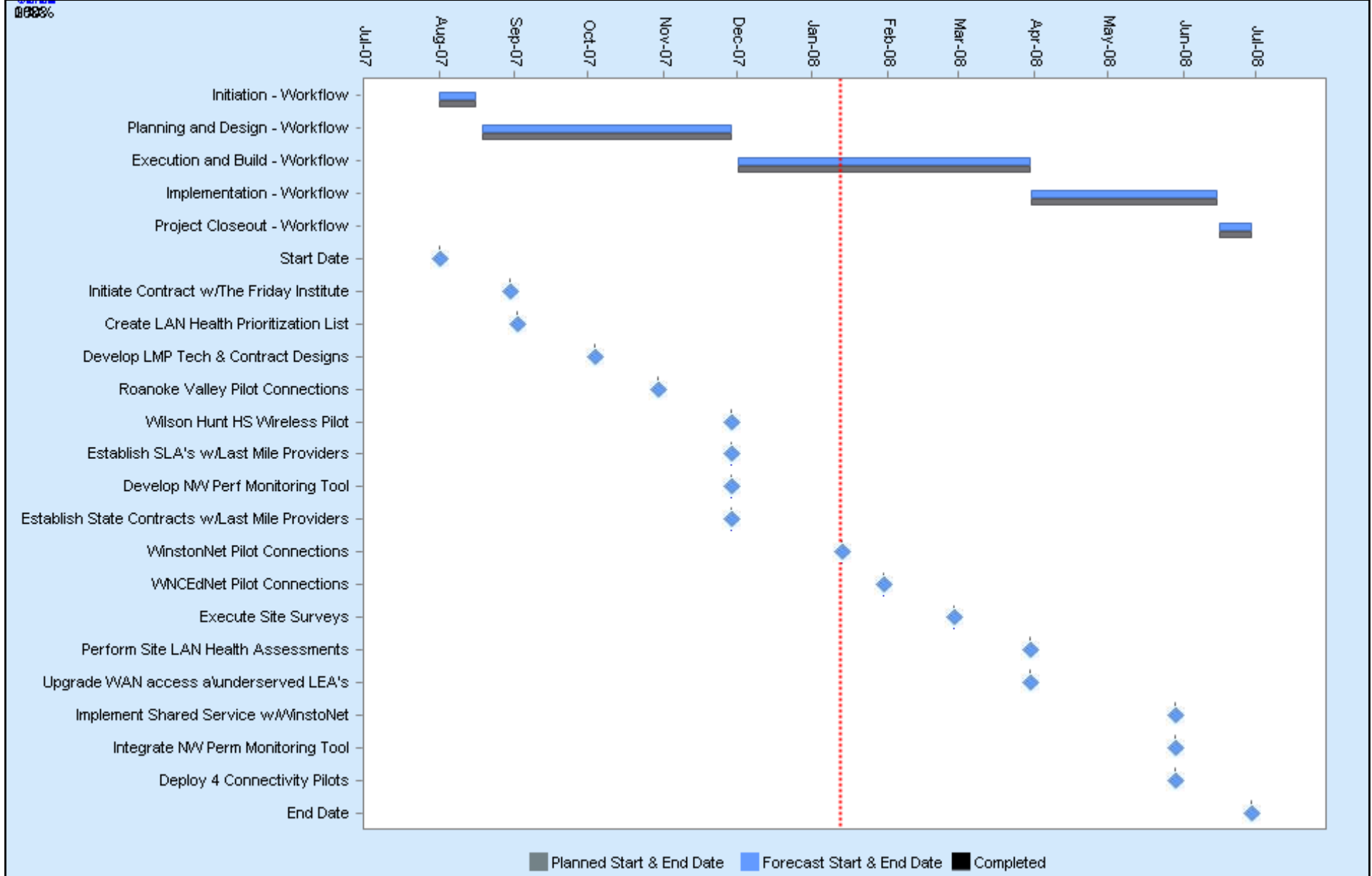
Project Status Report

Reporting Date: 1/14/2008

Project - **LAN Health Assessment**

Snapshot Name - December 2007

Project Schedule





Project Status Report

Reporting Date: 1/14/2008

Project -

Snapshot Name - December 2007



Planned Milestone



Forecast Milestone



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Project Phases					
Phase Name	Planned Start Date	Planned End Date	Forecast Start Date	Forecast End Date	Completion(%)
Initiation - Workflow	08/02/2007	08/17/2007	08/02/2007	08/17/2007	100.00 %
Planning and Design - Workflow	08/20/2007	11/30/2007	08/20/2007	11/30/2007	100.00 %
Execution and Build - Workflow	12/03/2007	03/31/2008	12/03/2007	03/31/2008	25.00 %
Implementation - Workflow	04/01/2008	06/16/2008	04/01/2008	06/16/2008	0.00 %
Project Closeout - Workflow	06/17/2008	06/30/2008	06/17/2008	06/30/2008	0.00 %

Project Milestones			
Milestone Name	Planned Date	Forecast Date	Variance(days)
Start Date	08/02/2007	08/02/2007	0
Initiate Contract w/The Friday Institute	08/31/2007	08/31/2007	0
Create LAN Health Prioritization List	09/03/2007	09/03/2007	0
Develop LMP Tech & Contract Designs	10/05/2007	10/05/2007	0
Roanoke Valley Pilot Connections	10/31/2007	10/31/2007	0
Establish State Contracts w/Last Mile Providers	11/30/2007	11/30/2007	0
Develop NW Perf Monitoring Tool	11/30/2007	11/30/2007	0
Establish SLA's w/Last Mile Providers	11/30/2007	11/30/2007	0
Wilson Hunt HS Wireless Pilot	11/30/2007	11/30/2007	0
WinstonNet Pilot Connections	01/14/2008	01/14/2008	0
WNCEdNet Pilot Connections	01/31/2008	01/31/2008	0
Execute Site Surveys	02/29/2008	02/29/2008	0
Upgrade WAN access aunderserved LEA's	03/31/2008	03/31/2008	0
Perform Site LAN Health Assessments	03/31/2008	03/31/2008	0
Deploy 4 Connectivity Pilots	05/30/2008	05/30/2008	0
Integrate NW Perm Monitoring Tool	05/30/2008	05/30/2008	0



Project Status Report

Reporting Date: 1/14/2008

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Snapshot Name - December 2007

Project Milestones

Milestone Name	Planned Date	Forecast Date	Variance(days)
Implement Shared Service w/WinstoNet	05/30/2008	05/30/2008	0
End Date	06/30/2008	06/30/2008	0

Issues

Title	Weight	Owner	Date Entered	Completed
Architecture0801	High	Jerry Bunn	8/9/2007	On 9/18/2007
Benefits91	High	Jerry Bunn	9/20/2007	On 12/19/2007
Budget91	Low	Jerry Bunn	9/20/2007	On 10/16/2007
Hours101	High	Jerry Bunn	10/18/2007	On 11/18/2007
Hours102	Medium	Jerry Bunn	10/18/2007	On 11/18/2007
Planning91	Low	Jerry Bunn	9/20/2007	On 11/18/2007 7:42:09 PM
Planning92	Low	Jerry Bunn	9/20/2007	On 11/18/2007 7:45:10 PM
Planning93	Medium	Jerry Bunn	9/20/2007	On 11/18/2007 7:49:15 PM
Rate91	Medium	Jerry Bunn	9/20/2007	On 10/16/2007
Risk91	High	Jerry Bunn	9/20/2007	On 11/18/2007 7:51:22 PM
Security080907	Medium	Jerry Bunn	8/9/2007	On 8/20/2007

Detailed Business Case



Detailed Business Case Report

Reporting Date: 1/14/2008

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Project Information Section

Project Name	Ü&@ [Ä[] } ^&çã Ä äää^ÄY€ Ä Ä• cã ä @Ä@ÄSFGÄ[{ { [] Ä^ç [\		
Start Date	8/2/2007	End Date	6/30/2008
Creation Date	7/29/2007	Workflow Status	Gate 2 State Approval
Fixed Start Date		Fixed End Date	
Benefits Start Date	6/30/2008	Capitalization Months	60
Project ID	DPI0769	Priority	
Project Range	\$500,000 - \$3,000,000	Proj. Range Level of Confidence	75-100%
Type of Project	Infrastructure	Budget Code	08015321501000101081
Initiation Phase Cost	4663	Planning Phase Cost	428468
Department or Agency	Public Instruction, Department of	Project Manager Telephone	919-807-3308
Division	Technology & Information Services	Project Security Contact	Alexis Bouchard
Project Manager Name	Jerry Bunn	Project Sponsor Organization	NCDPI
Project Manager Email	Jbunn@DPI.state.nc.us	Expansion Budget Request	
Project Sponsor	Ed Chase	Assigned PMA	Alisa Cutler
New Expansion Budget \$ required in Year2	No	New Expansion Budget \$ required in Year1	

Initiation Phase - Project Charter

Business Issues and Business Goals	
Business Issues	V@ÄPÖÄ^Ä^äÄ•^ { ä Ä } ä äÄ T Ä Ä^} äÄÄÄ FÄ Ä } äÜ&@ [Ä[] } ^&çã Ä äää^ÄY€ Ä Ä• cã ä @Ä@ÄSFGÄ[{ { [] Ä^ç [\
Business Goals	The goal of the School Connectivity Initiative (SCI) is to connect K12 schools into a statewide education network that ensures consistent broadband connectivity to all schools and classrooms and transfer the cost of network connectivity from the LEA's to the State.
Project Definition	



Detailed Business Case Report

Reporting Date: 1/14/2008

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Initiation Phase - Project Charter

Project Goals	<p>The Project goals in Year One are:</p> <ul style="list-style-type: none">Connect 80% of the 115 LEA's to the education newtworkComplete 33% of the 2400 K12 schools LAN assessmentsEstablish Nework Monitoring for 33% of the 2400 K12 schoolsConnect 25% of the K12 Schools to the LEA hubDeploy 4 approved Connectivity Pilots which includes 23 LEA's
Project Deliverables	<p>"ÁU[çã^ÁÖP Á•••{ ^ } Á^• • Éã æ •ã Éã áÁ&[{ { ^ } áãã } •Á ÁU&@ [Á[] } ^&çã ÁQ] { ^ } çãã } É</p> <p>"ÁÖ^ ^ Á Áã] ç^áÁ[] } ^&çã ÁU[• Á @Á@] •ã Á -Á-ÁÖÖÁQ^ Áã Á [•^áÁdæ^*^D</p> <p>"ÁÖ• çã ã @Á çã, á^Áã:á Á] dæÁ Á Á æÁæÁ•• ÁÁ ç &[] } ^&çã } Á^Á ã *</p> <p>"ÁÖ• çã ã @Á [{ [] Á^ÁçÁ^Áç^Á^ Á^ Á^ { ^ } • Á áQáæ Á Á^ÁçÁÁ çã^ •</p> <p>"ÁM * á^Á Á ÖP • Á -Á } á^ • Á ç^áÁÖÖ Á @ Á^ Áæ á^ Áæ Áæ } çã áÁ Á@ÁÖP Á^ áQÁÖ • Á • { ^ } •</p> <p>"ÁM * á^ Á@Á^ á^ á^ } Á^ç [\ Á Á^ Á^ • æ Á Á ç &[] } ^&çã áQ æÁ^ÁçÁÁ çã^ • É@ÁÖÖÁU • Éã áÁ^ • á^ } çãÁU •</p> <p>æ áÁæ } áã } ÁÖÖ Á Á@Á^ á^ á^ } Á^ç [\ Á @ Á^ Áæ á^</p> <p>"ÁÖ^ç^ Á áÁ^ ^ Á^ • çã á^ Á^ á^ ^ { ^ } Á &•• Á Á áã á^ ~ Á áÁ^ ^ áá Á^ { æ & Áæ æ • áÁ -Á &@ [</p> <p>&[] } ^&çã</p>
Items out of Scope	<p>Çããã } æÁÖÁU[Á & ÁÁÖ^ á^ á^ • Á Á^ Á [áæ æ^ áÁ^ Á@ÁQ áæ ÁQ • çã ÁÁ Á , • L</p> <p>"ÁQ^ } çã Áæ áÁU áá^ Á^ Á^ ÁÖ Á^ Á^ Á^ •</p> <p>"ÁÖ• çã ã @ÁUæ ÁU^ÁçÁÁ Á^ Á^</p> <p>"ÁÖ• çã ã @Á^ç [\ Á[] • ç^ ÁU^ÁçÁÁ Á^ Á^</p> <p>"ÁQ] { ^ } çãã } Á ÁUæ^ ÁÁ [çã çãã } Á æ</p> <p>"ÁQ] { ^ } çãã } Á ÁUæ^ ÁÁU^ * æ á áãã } Á æ</p> <p>"ÁQ] { ^ } çãã } Á ÁUæ^ ÁÁU^ } áã * Á æ</p> <p>"ÁÖ [áæ æ Á@Á^ } áã á^ Á^ Á Á -Á &@ [&[] } ^&çã Á Á^ á^ ÁGBÁH</p>



Detailed Business Case Report

Reporting Date: 1/14/2008

Project - [Illegible]

Initiation Phase - Project Charter

Project Organization and Roles	<p>Peter Asmar, NCDPI CIO Frances Bradburn, Director, Instructional Technology Division, NCDPI Annemarie Timmerman, DPI Regional Technology Consultant, Business Subject Matter Expert Mary Lou Daily, DPI Regional Technology Consultant, Business Subject Matter Expert Kerry Mebane, DPI Regional Technology Consultant, Business Subject Matter Expert Melanie Honeycutt, DPI Regional Technology Consultant, Business Subject Matter Expert Acacia Dixon, DPI Regional Technology Consultant, Business Subject Matter Expert Annette Murphy, NCDPI PMO Jerry Bunn, NCDPI Project Manager Pili Emer, Managing Director, Friday Institute Technical Project Team Partners</p> <ul style="list-style-type: none">-- NC EdNET-- NCREN-- NC Wise-- NC ITS-- MCNC <p>NCDPI -- will co-manage all aspects of the project with FI -- NC State University/NCREL/Project Tomorrow -- the Friday Institute for Educational Innovation Possible Last Mile Connectivity Partners</p> <ul style="list-style-type: none">-- AT&T-- Embarq-- Time Warner Cable <p>Stakeholders representing the LEAs and public schools:</p> <ul style="list-style-type: none">-- Teachers-- Students-- Parents-- Instructional Technology Coordinators-- Principals-- Deputy Superintendent of Instruction
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Enterprise Architecture Questionnaire

Select the Common Shared Technical Infrastructure and Services	Network	Will this project replace or enhance an existing system?	No
Will the project include security enhancements for an existing system?	No	Which clients will access this system via the Internet?	N/A
Which clients will require login functionality?	N/A	Is this system required to comply with federal or state privacy laws?	No



Detailed Business Case Report

Reporting Date: 1/14/2008

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Will this system interface with State Business Infrastructure Systems?	No	Which entities will this system integrate with?	N/A
Which staffing approach will be utilized to deliver this system?	TBD		
How will the functionality for this system be delivered?	Incrementally	What Pilot approach will be utilized prior to rollout of this system?	N/A
Alternatives Analysis Completed			
Alternatives Analysis Completed	N/A		
Project Manager Interview Completed			
Project Manger Interview Completed	Yes		
Service Component Reference Model			
Service Domain		Service Type	
Component #1			
Component #2			
Component #3			
Component #4			
Component #5			

Planning and Design Phase			
Agency Document Checklist			
Select the artifacts this project will or will not be producing:			
Project Plan	Yes	Work Breakdown Structure (WBS)	Yes
Staffing Plan	Yes	Business Reqs Documented	Yes
Communication Plan	Yes	Hardware & Software Procurement	N/A
Change Management Plan	Yes	Training Plan	N/A
Project Test Plan	Yes	Deployment/Rollout Plan	Yes
Acceptance Criteria	Yes	Risk Management Plan	Yes



Detailed Business Case Report

Reporting Date: 1/14/2008

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Planning and Design Phase

Data Conversion/Migration Plan		Project Quality Assurance Plan	N/A
Statement of Work (SOW)	Yes	Configuration Management Plan	Yes

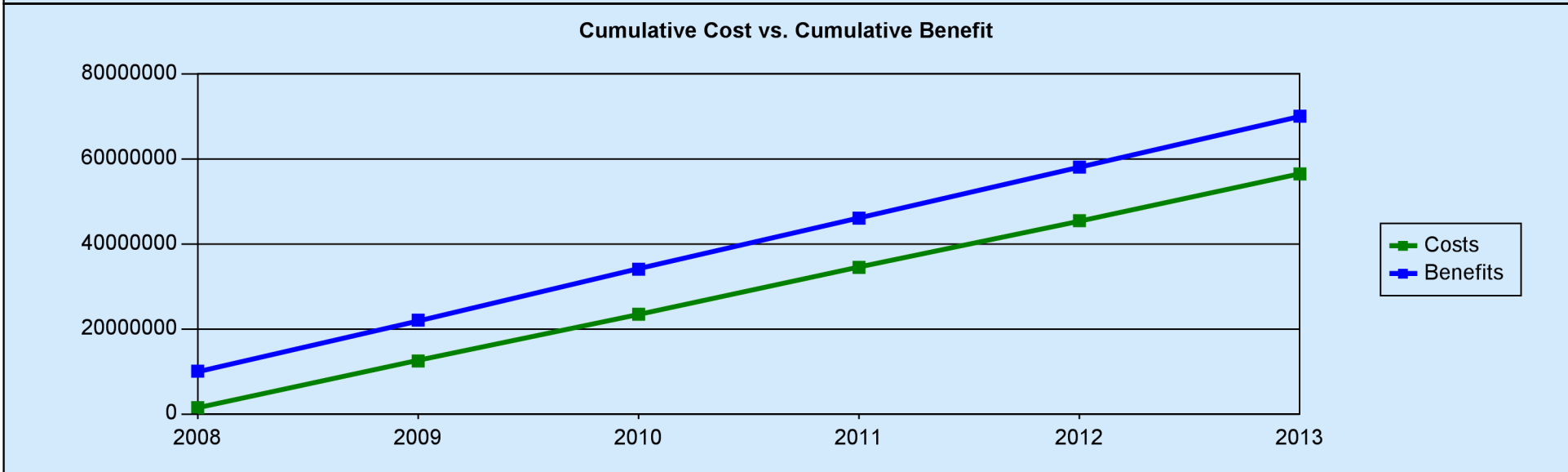
Execution and Build Phase

Agency Document Checklist

Select the artifacts this project will or will not be producing:

System Integration Plan		Test and Acceptance Results	Yes
Pilot Results	Yes	Change Management Plan	Yes
Disaster Recovery/Business Continuity Plan	Yes	Operations & Maintenance Transition Plan	N/A

Cost Benefit Analysis





Detailed Business Case Report

Reporting Date: 1/14/2008

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Benefit Forecast Table	2008	2009	2010	2011	2012	2013	Total
TOTAL BENEFITS - Fiscal Year	\$ 10,000,000	\$ 12,000,000	\$ 12,000,000	\$ 12,000,000	\$ 12,000,000	\$ 12,000,000	\$ 70,000,000
Enhanced Revenues	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Operational or Other Savings	\$ 0	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 10,000,000
Avoided Costs	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 10,000,000	\$ 60,000,000
Other Monetary Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0



Detailed Business Case Report

Reporting Date: 1/14/2008

Project - U&Q [|Á[] } ^&ãã Áããã^Áÿ€ Á Á•caã á@ÁFGÁ[{ { [] Á^ç [\\\

Budget Cost Table	2008	2009	2010	2011	2012	2013	Total
Total Investment Cost	\$ 1,404,618	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 10,999,984	\$ 56,404,618
Project Costs	\$ 1,404,618	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 1,404,618
Initiation	\$ 4,663	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 4,663
Internal Personnel	\$ 4,663	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 4,663
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Planning & Design	\$ 428,468	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 428,468
Internal Personnel	\$ 12,962	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 12,962
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 391,864	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 391,864
Other External Costs	\$ 23,642	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 23,642
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Execution & Build	\$ 640,727	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 640,727



Detailed Business Case Report

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Budget Cost Table	2008	2009	2010	2011	2012	2013	Total
Internal Personnel	\$ 15,988	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 15,988
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 572,511	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 572,511
Other External Costs	\$ 52,228	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 52,228
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Implementation	\$ 328,720	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 328,720
Internal Personnel	\$ 9,937	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 9,937
External Personnel	\$ 286,883	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 286,883
Other External Costs	\$ 31,900	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 31,900
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Project Closeout	\$ 2,040	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 2,040
Internal Personnel	\$ 2,040	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 2,040
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

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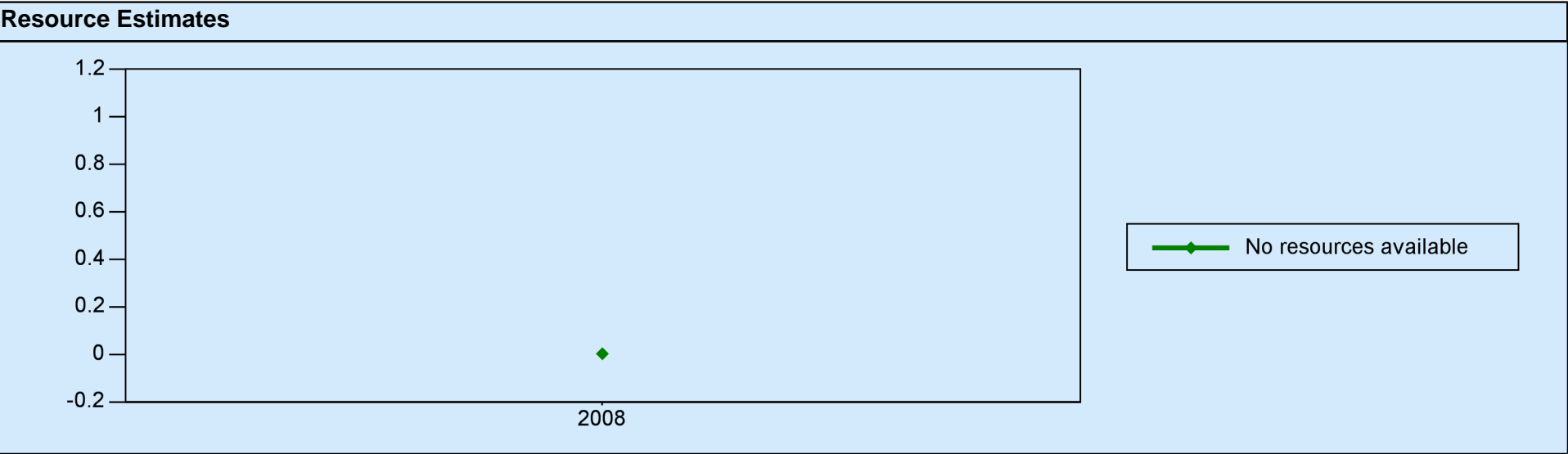
Budget Cost Table	2008	2009	2010	2011	2012	2013	Total
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other Investment Costs	\$ 0	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 10,999,984	\$ 55,000,000
Operations & Maintenance	\$ 0	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 11,000,004	\$ 10,999,984	\$ 55,000,000
Internal Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
External Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other External Costs	\$ 0	\$ 1,500,000	\$ 2,000,004	\$ 2,000,004	\$ 2,000,004	\$ 1,999,988	\$ 9,500,000
Infrastructure-Hardware	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Infrastructure-Software	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Other (Describe)	\$ 0	\$ 9,500,004	\$ 9,000,000	\$ 9,000,000	\$ 9,000,000	\$ 8,999,996	\$ 45,500,000



Detailed Business Case Report

Reporting Date: 1/14/2008

Project -



Competencies	2008	Total
No resources available	0	0



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Project Risk			
		Overall Risk	Low
01 Schedule Risk : 10.00%			
	01 - 01 Schedule / Timetable	No (Low Risk)	
Does the schedule/timetable for completion of the whole project (not just the next phase) exceed 12 months?			
1	1 No		
2	10 Yes		
	01 - 02 Fixed End Date	No (Low Risk)	
Does the project have a rigid, inflexible, and fixed end date?			
1	1 No		
2	10 Yes		
02 Funding Risk : 10.00%			
	02-01 Project Funding	Fully identified / secured (Low Risk)	
Is funding for the whole project (not just the next phase) not identified / secured?			
1	1 Fully identified / secured		
2	5 Partially identified / secured		
3	10 Not identified / secured		
03 Project Management Risk : 10.00%			
	03 - 01 Project Team Size	No (Low Risk)	
Will the project team consist of greater than 10 FTE for any phase or part of the project?			
1	1 No		
2	10 Yes		
	03 - 02 Project Team Location	No (Low Risk)	
Will the project team be located at different geographical sites?			
1	1 No		
2	10 Yes		



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Project - Ú&@ [|Á[] } ^&ãã Áããã Áÿ€ Á Á•ca|ã @ã@ÁFGÔ[{ { [] Á^ç [\\\

Project Risk			
		Overall Risk	Low
03 Project Management Risk : 10.00%			
		03 - 03 Project Sponsor	Yes (Low Risk)
Will the project be assigned a project sponsor from the business/program area and will he or she have the necessary breadth and level of authority?			
1	1	Yes	
2	10	No	
		03 - 04 Vendor	No (Low Risk)
Will the project involve more than one prime vendor or will the project involve one or more contracts totaling together over \$25 million?			
1	1	No	
2	10	Yes	
		03 - 05 Business Requirements	Yes (Low Risk)
Do the business/program areas know the business requirements and will the requirements be stable over the life of the project?			
1	1	Yes	
2	10	No	
		03 - 06 Goals & Objectives	Yes (Low Risk)
Are the business/program goals and objectives known and agreed to by both business/program and IT executives?			
1	1	Yes	
2	10	No	
04 Technology Risk : 10.00%			
		04 - 01 New/Unproven Technologies	No (Low Risk)
Are any of the major technologies that will be used for the project new to the agency or unproven in general industry experience?			
1	1	No	
2	10	Yes	
		04 - 02 Custom Developed Software	No (Low Risk)
Will the project employ custom-developed software or COTS packages that will be customized/changed over 20%?			
1	1	No	



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Project - U&Q [|Á[] } ^&çã Áããã^Áÿ€ Á Ò•ca|ã @Á@ÁFGÔ[{ { [] Á^ç [\\\

Project Risk			
		Overall Risk	Low
04 Technology Risk : 10.00%			
2	10	Yes	
04 - 03 Data Interfaces		No (Low Risk)	
Will the project involve more than 3 data interfaces or integrations to exchange information with other systems/applications?			
1	1	No	
2	10	Yes	
04 - 04 Existing Infrastructure		Yes (Low Risk)	
Will the existing infrastructure (computing power, data storage capacity, communications bandwidth, user interface processing, etc.) be adequate for the system/application?			
1	1	Yes	
2	10	No	
05 Organization Risk : 32.50%			
05 - 01 Number of Users/Stakeholders		Yes (High Risk)	
Will the number of different types of users plus number of different stakeholders exceed 5?			
1	1	No	
2	10	Yes	
05 - 02 Organization Involvement		No (Low Risk)	
Will the number of business/program governmental organizations involved in the project be greater than 3 (each local governmental entity counts as 1)?			
1	1	No	
2	10	Yes	
05 - 03 Implementation Sites		No (Low Risk)	
Will there be more than 50 geographically dispersed implementation sites?			
1	1	No	
2	10	Yes	
05 - 04 Implementation Approach		No (Low Risk)	

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Reporting Date: 1/14/2008

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Project Risk			
		Overall Risk	Low
05 Organization Risk : 32.50%			
1	1	No	
2	10	Yes	
06 Business / Program Impact Risk : 10.00%			
06 - 01 Business Process		No (Low Risk)	
Will the project affect more than 1 business process?			
1	1	No	
2	10	Yes	
06 - 02 User Responsibilities		No (Low Risk)	
Will user work tasks/jobs be changed significantly as a result of the project?			
1	1	No	
2	10	Yes	
06 - 03 Organizational Structure		No (Low Risk)	
Will the organizational structure or reporting relations be changed significantly as a result of the project?			
1	1	No	
2	10	Yes	
07 Consequence of Failure Risk : 100.00%			
07 - 01 Project Cancellation		Yes (High Risk)	
If the project is stopped before completion and has incurred significant expenditures with little residual benefit, will there be serious consequences (such as embarrassing, widespread and negative publicity)?			
1	1	No	
2	10	Yes	
07 - 02 Schedule slippage / Budget overruns		Yes (High Risk)	
If the project accomplishes most of the business/program objectives, but experiences significant schedule slippages and/or budget overruns, will there be serious consequences (such as embarrassing, widespread and negative publicity)?			
1	1	No	



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Project - Ú&@ [|Á[] } ^&ãã ÁQããã^ÁY€ Á ÁÖ•cããã Á@ÁFGÁ[{ { [] Á^ç [!\

Project Risk			
		Overall Risk	Low
	07 Consequence of Failure Risk : 100.00%		
2	10	Yes	



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Strategic Impact		
Driver Name	Grow Self-Service	None
Driver Definition	Build and enhance capabilities to allow the public to conduct state business online.	
Extreme	Over 1 Million person-hours savings (calculated by taking the number of users of the application times the average time savings per user).	
Strong	100K to 1Million person-hours savings (calculated by taking the number of users of the application times the average time savings per user).	
Moderate	10K to 100K person-hours savings (calculated by taking the number of users of the application times the average time savings per user).	
Low	1K to 10K person-hours savings (calculated by taking the number of users of the application times the average time savings per user).	
None	Under 1K person-hours savings (calculated by taking the number of users of the application times the average time savings per user).	
Driver Name	Ensure Legal and Regulatory Compliance	None
Driver Definition	Ensure that there is a proper governance framework in place to ensure compliance with laws and regulations.	
Extreme	Over \$20M effect (in repercussions of non-compliance - loss of funds, penalties, etc).	
Strong	\$5M to 20M effect (in repercussions of non-compliance - loss of funds, penalties, etc).	
Moderate	\$1M to \$5M effect (in repercussions of non-compliance - loss of funds, penalties, etc).	
Low	\$100K to \$1M effect (in repercussions of non-compliance - loss of funds, penalties, etc).	
None	Under \$100K effect (in repercussions of non-compliance - loss of funds, penalties, etc).	
Driver Name	Revenue Generation (Net)	None
Driver Definition	Increase the State's revenue by improving collections, seeking new sources of revenue, etc.	
Extreme	Over \$100M in Revenue	
Strong	\$10M to \$100M in Revenue	
Moderate	\$1M to \$10M in Revenue	
Low	\$100K to \$1M in Revenue	
None	Under \$100K in Revenue	



Detailed Business Case Report

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Strategic Impact		
Driver Name	Cost Savings (Net)	None
Driver Definition	Reduce operational costs by one or more methods such as reducing telephone calls by the use of e-mail, consolidating hardware, eliminating headcount, etc.	
Extreme	Over \$10M in Cost Savings	
Strong	\$1M to \$10M in Cost Savings	
Moderate	\$100K to \$1M in Cost Savings	
Low	\$50K to \$100K in Cost Savings	
None	Under \$50K in Cost Savings	
Driver Name	Unified Services	None
Driver Definition	Improve the delivery of citizen or business services by providing multiple services at a single physical location or by data sharing between applications and programs. Services can be provided by one or multiple departments.	
Extreme	5 Services Combined	
Strong	4 Services Combined	
Moderate	3 Services Combined	
Low	2 Services Combined	
None	No Services Combined	



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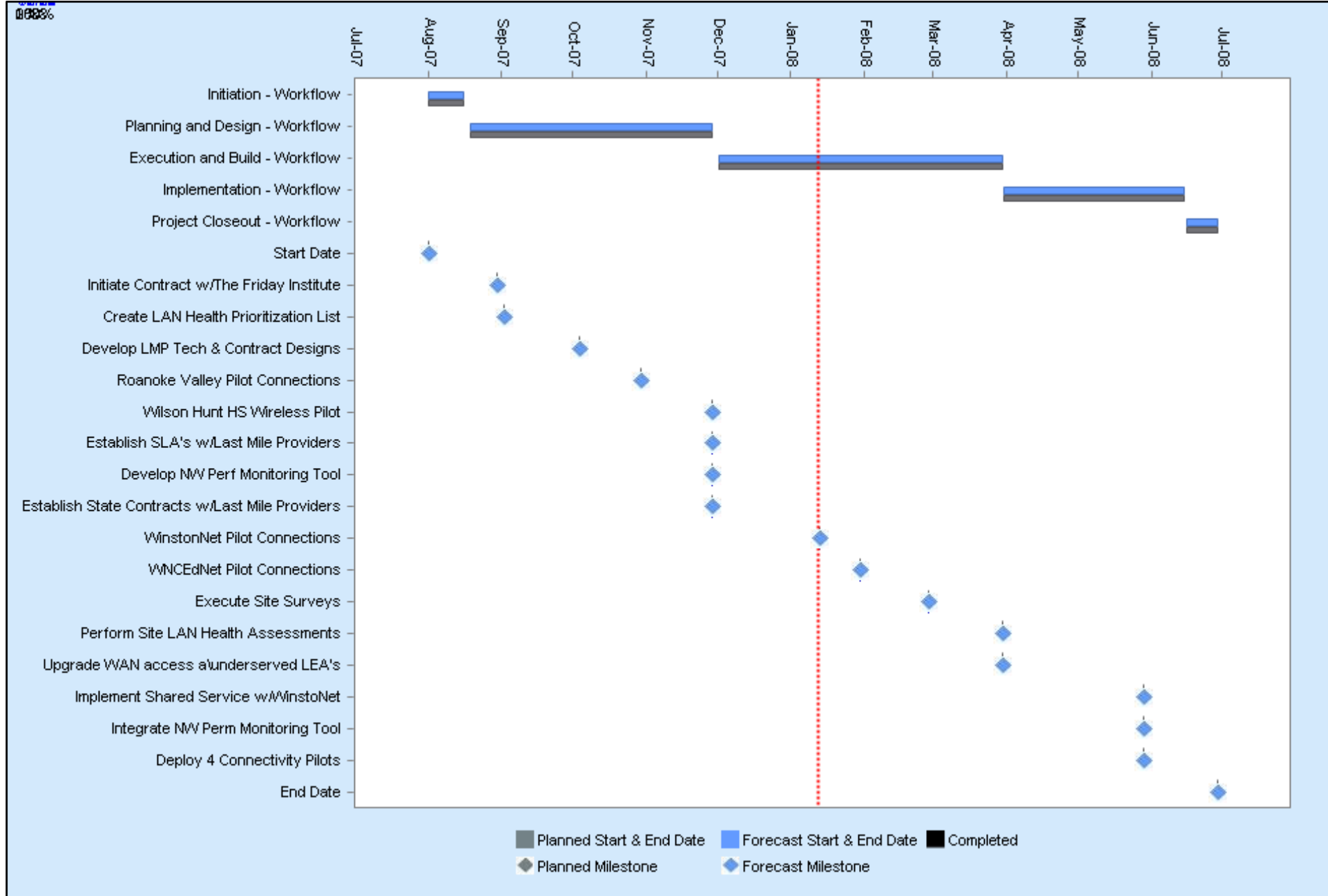
Project Schedule



Detailed Business Case Report

Reporting Date: 1/14/2008

Project - [Project Name]





Detailed Business Case Report

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Project - U&Q [|Á[] } ^&çã ÁQããã^ÁY€ Á ÁÖ•ca|ã @ã@ÁFGÁ[{ { [] Á^ç [\\\

Project Phases

Phase Name	Planned Start Date	Planned End Date	Forecast Start Date	Forecast End Date	Completion(%)
Initiation - Workflow	08/02/2007	08/17/2007	08/02/2007	08/17/2007	100.00 %
Planning and Design - Workflow	08/20/2007	11/30/2007	08/20/2007	11/30/2007	100.00 %
Execution and Build - Workflow	12/03/2007	03/31/2008	12/03/2007	03/31/2008	25.00 %
Implementation - Workflow	04/01/2008	06/16/2008	04/01/2008	06/16/2008	0.00 %
Project Closeout - Workflow	06/17/2008	06/30/2008	06/17/2008	06/30/2008	0.00 %

Project Milestones

Milestone Name	Planned Date	Forecast Date	Variance(days)
Start Date	08/02/2007	08/02/2007	0
Initiate Contract w/The Friday Institute	08/31/2007	08/31/2007	0
Create LAN Health Prioritization List	09/03/2007	09/03/2007	0
Develop LMP Tech & Contract Designs	10/05/2007	10/05/2007	0
Roanoke Valley Pilot Connections	10/31/2007	10/31/2007	0
Establish State Contracts w/Last Mile Providers	11/30/2007	11/30/2007	0
Develop NW Perf Monitoring Tool	11/30/2007	11/30/2007	0
Establish SLA's w/Last Mile Providers	11/30/2007	11/30/2007	0
Wilson Hunt HS Wireless Pilot	11/30/2007	11/30/2007	0
WinstonNet Pilot Connections	01/14/2008	01/14/2008	0
WNCEdNet Pilot Connections	01/31/2008	01/31/2008	0
Execute Site Surveys	02/29/2008	02/29/2008	0
Upgrade WAN access aunderserved LEA's	03/31/2008	03/31/2008	0
Perform Site LAN Health Assessments	03/31/2008	03/31/2008	0
Deploy 4 Connectivity Pilots	05/30/2008	05/30/2008	0
Integrate NW Perm Monitoring Tool	05/30/2008	05/30/2008	0
Implement Shared Service w/WinstoNet	05/30/2008	05/30/2008	0
End Date	06/30/2008	06/30/2008	0

SCI Resource Plan—Connectivity

		Labor Required (hrs.)														
Deliverable/Task/Resource	Start Date	End Date	July	August	September	October	November	December	January	February	March	April	May	June	Total	Cost Basis
Data gathering and analysis																
Priority 1 LEA visits (15) - underserved LEAs	2-Jul-07	31-Aug-07													5 hrs. per site visit per resource	
Resource - Project Manager			35	40											75	
Resource - Cisco Fellow [DS]			35	40											75	
Priority 2 LEA visits (70) - vetting & collaboration	3-Sep-07	14-Dec-07													6 hrs. per site visit	
Resource - Cisco Fellow [DS]					60	60	60	30							210	
Resource - Contractor 4					60	60	60	30							210	
															Subtotal:	570
Develop refined scope of work and measurement plans for existing and new pilots	2-Jul-07	31-Aug-07														
Resource - Contractor 4			80	80											160	
Manage pilot deployment and alignment with SBE priorities	3-Sep-07	14-Dec-07														
Resource - Contractor 4					80	80	80	80	80	80	80	80	80	80	800	
Engineer and deploy 1to1 Pilots for New Schools (L&E HSs)																
Resource - Contractor 5			80	80	80	80	80	80							480	
															Subtotal:	1,440
Assimilate existing contracts (ITS, MCNC, etcetera)	2-Jul-07	31-Jul-07														
Resource - Cisco Fellow [RH]				12											12	
Develop set of standardized services, and service/performance levels	2-Jul-07	31-Jul-07														
Resource - Project Manager				8											8	
Resource - MCNC engineering				20											20	
Negotiate statewide contracts/agreements w/ priority carriers	1-Aug-07	31-Oct-07														
Resource - Project Manager				20	20	20									60	Six priority carriers
Cisco Fellow [DS]				20	20	20									60	20 hrs. per contract
Resource - MCNC engineering				24	24	24									72	12 hrs. per contract
Resource - MCNC legal				0	0	0									0	4 hrs. per contract
Negotiate statewide contracts/agreements w/ secondary carriers	1-Nov-07	30-Jun-08														
Resource - Project Manager							24	24	22	22	22	22	22	22	180	10 secondary carriers
Resource - MCNC engineering							14	14	12	12	12	12	12	12	100	18 hrs. per contract
Resource - MCNC legal							0	0	0	0	0	0	0	0	0	3 hrs. per contract
															Subtotal:	512
Upgrade WANs of underserved LEAs where feasible																
Develop multi-year plan to address local connectivity needs for underserved LEAs/schools based on -	2-Jul-07	28-Sep-07														Eight LEAs
- Data gathering and analysis																
- Work with WAN providers to determine feasibility & cost																
Resource - Project Manager																
Resource - MCNC engineering			20	40	40										100	20 hrs. per LEA
Work with year-1 LEAs to meet E-Rate process requirements - 470	1-Oct-07	30-Nov-07													60	
Resource - E-rate			20	20	20											
Work with year-1 LEAs to meet E-Rate process requirements - 471	2-Jan-08	29-Feb-08													0	Covered under Services - e-Rate
Resource - E-rate																
Coordinate year-1 LEA WAN upgrades pending FCDL	3-Mar-08	30-Jun-08													0	Covered under Services - e-Rate
Resource - Project Manager											40	40	40	40	160	20 hrs. per LEA
															Subtotal:	320
Upgrade NCREN network as necessary to interconnect with local service providers, the LEA ISPs, and residential ISPs and transition LEAs to NCREN where feasible																
Develop multi-year plan to connect local service providers and ISPs to the NCREN backbone based on -	2-Jul-07	31-Oct-07														16 carriers @ 1.5 interconnections per carrier
- Data gathering and analysis																4 network expansion projects
- Work with local service providers/ISPs to determine feasibility & cost																
- Regional projects, e.g. WinstonNet and WNC EdNet																
Resource - Project Manager			40	40	40	40									160	20 hours per interconnection/expansion
Resource - MCNC engineering			40	40	40	40									160	
Resource - MCNC legal			0	0	0	0									0	
Engineer/manage NCREN upgrades for interconnection with year 1 local service providers and ISPs	3-Sep-07	30-Jun-08														100 hrs per expansion project
Resource - Project Manager					4	4	4	4	4	4	4	4	4	4	40	
Resource - MCNC engineering					36	36	36	36	36	36	36	36	36	36	360	
Resource - MCNC legal					0	0	0	0	0	0	0	0	0	0	0	

Develop and deploy a sustainable measurement process for meaningful and repeatable performance analysis of school connectivity

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Summary

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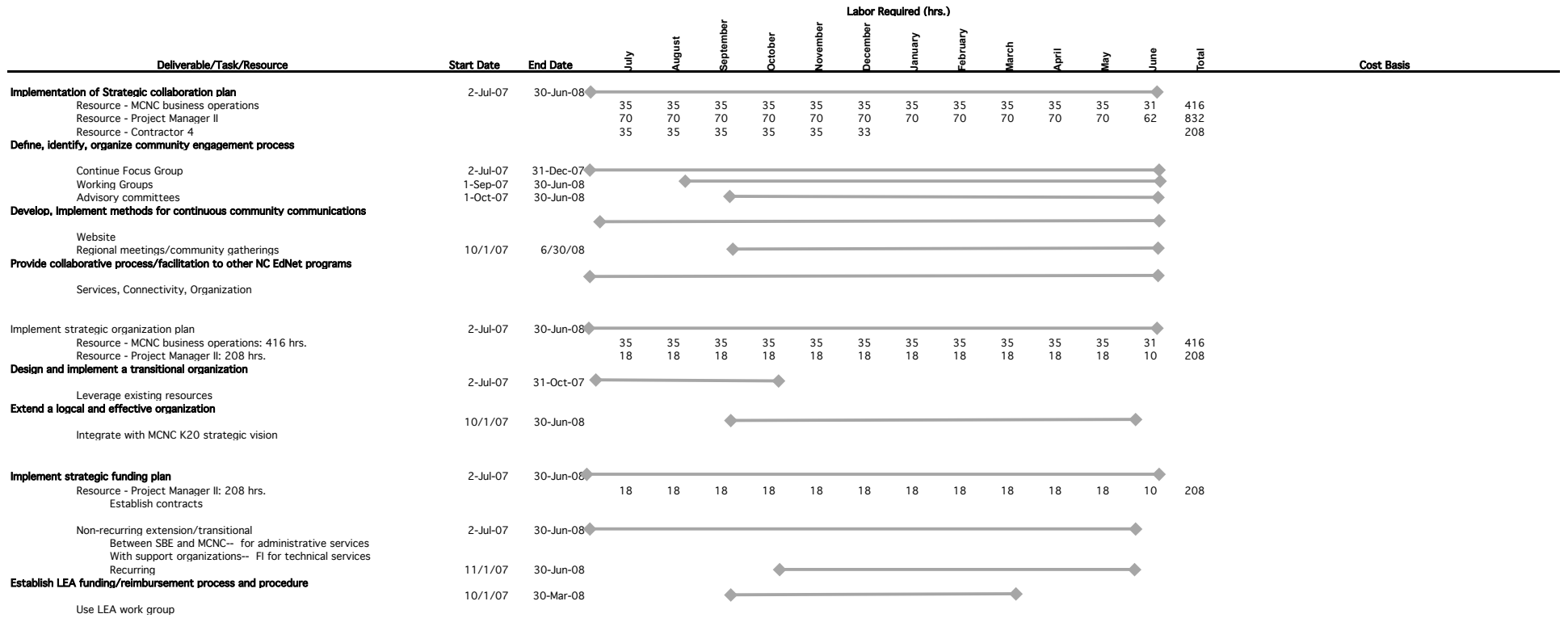
SCI Resource Plan—Services

[illegible]

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	Total:	110	460	630	518	1,108	920	650	650	646	646	636	636	7,610
Summary	J	A	S	O	N	D	J	F	M	A	M	J		Total
Resource - project manager	20	110	164	138	122	98	108	108	108	108	98	98	108	1,280
Resource - MCNC engineering	0	40	160	90	26	22	22	22	18	18	18	18	18	454
Resource - MCNC maint.	0	30	40	0	0	0	0	0	0	0	0	0	0	106
Resource - MCNC staff engineering	0	0	0	0	640	480	320	320	320	320	320	320	320	3,040
Resource - MCNC development	0	120	120	120	120	120	0	0	0	0	0	0	0	600
Resource - MCNC operations	0	40	40	40	40	0	0	0	0	0	0	0	0	160
Resource - erate project management	90	120	100	100	60	40	40	40	40	40	40	40	40	750
Resource - MCNC erate state program manager	0	0	0	0	0	100	160	160	160	160	160	160	160	1,220
												Subtotal:		7,610

SCI Resource Plan—Organization & Funding



E-Rate Central Proposal

RFP 40-E-Rate Bureau

E-Rate Consulting Services

Proposal by

E-RATE CENTRAL

For

**Department of Public Instruction
Raleigh, North Carolina**

THIS PROPOSAL CONTAINS INFORMATION THAT IS PROPRIETARY TO E-RATE CENTRAL, INC. NO PART OF THIS PROPOSAL MAY BE DUPLICATED OR USED WITHOUT THE PRIOR CONSENT OF E-RATE CENTRAL THIS PROPOSAL IS VALID FOR 365 DAYS.

E-Rate Central

October 19, 2007

BID Number **40-E-Rate Bureau**
Department of Public Instruction
Attn: Mike Beaver, Contract Manager
301 North Wilmington Street
Raleigh, NC 27601

Re: E-Rate Consulting Services

E-Rate Central, a nationally recognized and respected E-Rate consulting firm, is pleased to submit this proposal in response to the Request for Proposal 40-E-Rate Bureau for E-Rate Consulting Services and the establishment of an E-Rate Bureau for the Department of Public Instruction of North Carolina.

We have the capability and experience to do the job well.

Tel/Logic Inc., d.b.a. E-Rate Central, is a specialized K-12 consulting firm dedicated to navigating the E-rate application process and maximizing funding for its clients. Its primary business is to provide application, administrative, compliance, auditing, appeal, and technology review services. Since the E-rate program's inception in 1997, E-Rate Central has been involved with all aspects of the E-rate program at the local, state, and national levels.

- E-Rate Central is highly qualified to address all the E-Rate administrative needs as requested. Our organization has the proven expertise and experience to provide the full range of services requested.
- Our client base includes some of the largest and most complex school districts in the country such as New York City, Chicago, Cleveland, Albuquerque, and New Orleans.
- E-Rate Central provides E-rate consulting services to over 2,700 schools in 165 school districts throughout the country.
- E-Rate Central was also selected to function as the E-Rate Coordinator for the New York State Education Department and is a member of the State E-Rate Coordinators Alliance (SECA), an important organization representing 40 states.

Our highly satisfied clients range from very small districts and private schools to the largest consortia and school districts across the nation.

E-Rate Central

The Members of Our Staff are Experts in the Field.

E-Rate Central has eleven full-time employees with individual and a collective expertise that put the company above its competitors. Their professional backgrounds and years of experience make them well suited to address both the administrative detail and the complex challenges of the year-round E-Rate application process. E-Rate Central's professional staff includes:

- **Winston E. Himsworth**, *Executive Director of E-Rate Central*

Winston Himsworth, a noted expert on E-Rate policy and regulations, started E-Rate Central ten years ago at the inception of the program. He has worked with school districts across the country to maximize their benefits, sustain challenges to their applications, and prepare them for any audit or review. Win was selected to participate on a national USAC E-Rate advisory panel and was called as an expert witness before the McCain Senate Committee investigating the program. (resume attached)

- **George McDonald**, *Senior Consultant*

George McDonald joined E-Rate Central in July 2005. He was previously the Vice President of USAC for the Schools and Libraries Division and managed all aspects of the E-Rate program from 2001-2005. Prior to holding that position, he was the Director of Operations at the Schools and Libraries Division (1997-2001). George brings unmatched E-rate expertise, experience, and an insider's clarity of how the E-Rate program really works. (resume attached)

- **Greg Weisiger**, *Senior Consultant*

Greg Weisiger had been the E-Rate Coordinator for the Commonwealth of Virginia since the inception of the program as well as a member of SECA since the start of that organization. Under his guidance 98 percent of the Virginia public schools, on average, participate in the program each year with a funding utilization rate 10 percent higher than the national average. (resume attached)

- **A team of 11**

The other individuals working full time at E-Rate Central come from varied professional backgrounds including state E-Rate coordination, school district administration, USAC/SLD processing and review, and federal regulatory law. Each has years of experience with the E-Rate program and several have been involved since the program's inception. (resumes attached)

We Make a Commitment to the North Carolina Department of Public Instruction

E-Rate Central is prepared to provide the full range of services required by the Department of Public Instruction to fully benefit from the E-Rate Discount Program.

E-Rate Central is proud of its reputation for providing honest, expert and timely support to its E-rate clients, and we encourage the NCDPI to confirm our reputation with any of the Senior Managers at the SLD (202) 776-0200, with the State E-Rate Coordinators Alliance (SECA) head, (601) 359-2613, with other relevant State E-Rate Coordinators, or with any of our numerous clients. (client references are included in the proposal.)

E-Rate Central

E-Rate Central is pleased to respond to the RFP and would welcome the opportunity to work with the NCDPI. If you have any questions or require additional information regarding this proposal, please call me at 516-832-2881.

Sincerely,

Winston E. Himsworth
Executive Director- E-Rate Central

whimsworth@e-ratecentral.com

p. 516.832.2881

f. 516.832.2877

E-Rate Central

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2. Technical Specifications

E-Rate Central

2.1 Functional Requirements

2.1.a) Perform Maintenance of and updates to the State E-Rate Web and Listserv. The DPI State E-Rate Coordinator will oversee this activity.

E-Rate Central maintains individual E-Rate Web sites for the state of New York and the director of our Mid Atlantic office maintained the Virginia DOE E-Rate Web site for the past decade. The E-Rate Central national Web site is utilized by hundreds of applicants around the country for timely E-Rate funding and regulatory information.

E-Rate Central will work in conjunction with the DPI state E-Rate Coordinator (Coordinator) to ensure the DPI Web site contains the latest information for state schools. We will monitor the site for dead links, such as: <http://www.its.state.nc.us/ServiceCatalog/Index.htm> and notify the Coordinator when a dead or misdirected link is discovered.

We will make available to the Coordinator E-Rate Central's proprietary E-Rate databases for applicant funding and form filing deadlines for timely posting on the DPI Web site.

The Understanding the E-Rate Handbook for North Carolina Schools (*Attachment A*) will be made available for posting on the DPI Web site. Additional resources will include a sample survey for School Lunch discounts, a list of eligible services, federal contract information, and procedures for making existing contracts eligible for E-Rate funding.

We will merge the current North Carolina Listserv with the E-Rate Central contact list to create a comprehensive contact list for state E-Rate contacts.

2.1.b) Preparation and electronic distribution of a weekly newsletter, containing E-Rate new and tips tailored to NC applicants. The newsletter shall be distributed each Tuesday no later than 5:00 PM.

E-Rate Central has prepared and delivered electronically newsletters to New York schools since the E-Rate program began. The director of E-Rate Central's Mid-Atlantic office has provided updates to Virginia schools and libraries since 1998. We provide customized weekly updates to schools in New York, New Mexico, Louisiana, and a number of large urban school districts.

Our North Carolina designee will include North Carolina specific information each week and transmit the newsletter via email to the North Carolina Listserv (*Attachment B*).

E-Rate Central publishes the national newsletter on Monday mornings. North Carolina information will be added each Monday afternoon and submitted to the Coordinator for review and transmission to North Carolina school districts and charter schools.

2.1.c) Provide FAX, email, and telephone E-Rate help line support for E-Rate applicants Monday – Friday 8-5 EST.

E-Rate Central will reach out to North Carolina school district and charter school applicants that have missed October 29, 2007 filing deadlines for Year 2006 Invoices. There are approximately 100 applicants with \$6.9 million in outstanding funding that have either had invoices rejected by

E-Rate Central

SLD or have not submitted invoices. We will also reach out to Year 2007 applicants who have not filed Forms 486 for funded commitments. The earliest deadline for the Form 486 is October 29, 2007.

We will provide applicants with options for restoring funding when deadlines have passed. We will also reach out to applicants who have not filed required forms within two weeks of deadlines. Lists of deadlines for Year 2006 invoices and Year 2007 Forms 486 are attached (*Attachments C and D*). If the school district or charter school has missed a filing deadline because of personnel turnover (approximately 20 percent of E-Rate contacts are replaced each year), we will add the new contact to the contact list and invite the new contact to one of the regional training sessions and direct them to the DPI Web site.

During the E-Rate filing window, E-Rate Central staff will be available to North Carolina school districts and charter schools for E-Rate questions during weekday business hours. E-Rate Central staff in the Richmond, Virginia office will normally be available with the New York office serving as back-up. Each office is staffed with E-Rate subject matter experts with online access to North Carolina E-Rate data. E-Rate Central staff will be able to answer any question or direct the requestor to accurate information.

2.2d) *Coordination of NC-Specific E-Rate issues between Universal Service Administrative Company (USAC) and the appropriate state agencies.*

E-Rate Central has extensive experience as liaison between USAC and state agencies. We have several former USAC staff members on staff including George McDonald, former Vice President of the Schools and Libraries Division. We have three past or present state E-Rate coordinators on staff who have worked extensively with USAC on many E-Rate issues. Members of our staff have testified before Congressional E-Rate hearings on October 5, 2004 as expert witnesses. E-Rate Central served on the USAC waste, fraud, and abuse task force and our staff testified before the Federal Communications Commission hearings of waste, fraud, and abuse on May 8, 2003.

As state coordinators, we assist the Department of Education, Division of Information Services, Governor's Office, and Division of Procurement respond to USAC inquiries. Inquiries include eligibility of Pre-kindergarten programs, adult education programs and Juvenile Justice schools. We assist Information Technology and Procurement Divisions respond to USAC requests for procurement information and bid evaluation for state contracts.

In North Carolina we have been contracted by Pitt County to evaluate E-Rate compliance measures and recommend improvements. Our staff drafted a successful appeal on behalf of Winston-Salem Forsyth County and provided Durham with an appeal outline which is now pending before the FCC.

As necessary, E-Rate Central will work through the Coordinator to respond to USAC requests for specific information. For example, in the next several weeks USAC will communicate to the Office of the Governor and State School Superintendent a request for the legal status of Head Start

E-Rate Central

programs in the state as related to E-Rate regulations. E-Rate Central will work with the state Coordinator to research North Carolina law and provide an appropriate response to USAC.

We will work with the state Coordinator to ensure state contracts are eligible for E-Rate discounts by filing timely forms on the SLD Web site.

2.1.e) Conduct up to 12 (possibly 2 in each region) Regional E-Rate workshops for NC schools. These workshops will focus on the basic steps required for E-Rate funding and on specific issues such as service eligibility and procurement practices. The training will be held at designated sites provided by and located in the districts. Each training session will involve up to 30 participants.

E-Rate Central has broad experience providing E-Rate training to applicants of all skill levels. In the past three years, E-Rate Central staff members have conducted over 40 training sessions on behalf of state departments of education. Our staff is expert in all aspects of E-Rate regulation and policy.

We propose full-day sessions in each region during November and early December. Trainings will consist of a beginner's session in the morning followed by a veteran's session in the afternoon. Beginners should plan to stay for the afternoon session.

We will provide each participant with a copy of the Understanding the E-Rate Handbook, the E-Rate Eligible Services List, a list of North Carolina school Form 486 and invoice deadlines, an Income Survey Form, and E-Rate Training Power Point Presentations.

Training topics will include:

- Program Overview
- Technology Plan Preparation and Timing
- Technology Plan Approval and Duration
- Form 470 Preparation and Posting
- Form 470 Response Evaluation
- Contracts, Tariffs and Month-to-Month Service
- Memorialization of Existing Contracts
- Eligible Telecommunications Carriers
- Eligible Services
- Form 471 Preparation
- Program Integrity Assurance Review
- Funding Commitments
- Form 486 Preparation
- Form 472 Preparation
- Document Retention
- Audits
- Commitment Adjustments
- Appeals

E-Rate Central

2-in-5 Rule
Item 21 Attachments
Priority One Funding for On-Premises Equipment
Funding for Vendor Capital Expenses
Red Light
FCC Registration Numbers
Questions and Answers

Training sessions will be conducted by Greg Weisiger of the Richmond office. Greg is the former State Coordinator for the commonwealth of Virginia and has conducted regional training sessions for Virginia schools and libraries for the past three years and state and national teleconferences in other years.

2.1.f) Be a member of the National State E-Rate Coordinator's Alliance (SECA) and represent NC at quarterly meetings usually held in Washington DC until the incoming NCDPI E-Rate Director (Ed Chase) becomes a member.

E-Rate Central will designate Greg Weisiger as the SECA representative for North Carolina. Before leaving Virginia, Greg was a member of SECA from its inception. In matters before SECA, Greg will consult with the state Coordinator for direction.

2.1.g) Provide E-Rate training and support to the new DPI coordinator and his staff of between 5 and 15 personnel.

We encourage staff members located in state regions to attend training sessions. As necessary, E-Rate Central staff will be available for one-on-one or group sessions with DPI personnel and will be available via phone or email on a routine basis. This proposal includes up to three face-to-face sessions with E-Rate Central staff and NCDPI E-Rate staff members in the Raleigh area. We will be working closely with the state Coordinator on E-Rate compliance issues during the filing window and application review.

2.1.h) Provide monthly Status Reports – Monthly summaries which outline the work accomplished during the reporting period; work to be accomplished during the subsequent reporting period; and an issues log with problems, real or anticipated, which should be brought to the attention of the client agency's NCDPI Project Manager.

E-Rate Central routinely provides reports to state agencies and clients. Under a contract with Pitt County, North Carolina, we evaluated Pitt county E-Rate practices and reported their current status and recommendations for improvements.

E-Rate Central will provide monthly reports that include telephone and email logs of incoming and outgoing calls to North Carolina school districts and charter schools; copies of weekly newsletters, status of Forms 472 for 2006, status of Forms 486 for 2007, status of Forms 470 during December and January, and status of Forms 471 during January and February. We will also

E-Rate Central

provide a funding request summary at the end of the filing window and North Carolina specific issues raised during application review during the spring and summer of 2008.

2.1.i) Provide a Risk management plan where risks to the state E-Rate program are identified, their probability and impact ascertained and a mitigation plan to the risk is outlined.

E-Rate Central is unmatched in our ability to assess and mitigate E-Rate risks. Our staff includes the former Vice President of USAC, former program reviewers, auditors and past and present state coordinators. Our staff has unique insight to the operations and decision-making process of USAC.

The E-Rate program has many inherent risks because of complex regulations and policies and inconsistent enforcement by the Administrator. Risks include denial of funding, failure to secure funding due to missing filing deadlines, and demand for return of funds due to program rule violation.

E-Rate Central is very familiar with risks associated with the E-Rate program and their potential adverse impact on school funding. Applicant education as specified in this proposal is one key to minimize risk. Informed applicants are less likely to apply for ineligible services or enter into ineligible contracts. The denial rate for North Carolina applicants in 2005 was 48 percent of total funding requested. With the regional training sessions, newsletters, and Web site support we anticipate, the denial rate for the first year of this contract will be reduced to no more than 25 percent of total requested funding.

Telephone calls to applicants facing Form deadlines, described in this section, is another effective risk deterrent. Utilization of committed funding for North Carolina currently exceeds the national average by five percentage points. It has been our experience that E-Rate utilization rates will exceed the national average by well over 10 percentage points when applicants are individually called with deadline information verses letters or emails.

We are also able to identify funding denial trends early and inform applicants of previously unknown program review requirements through weekly updates or Web site updates. *Attachment E* includes a sample of denial reasons for North Carolina schools.

In rare instances a statewide contract is deemed ineligible by the SLD. We will assist the Coordinator to ensure all state contracts adhere to program rules and regulations. We will assist with appeals and presentations before the SLD and FCC if a state contract is denied funding.

We will work with the state Coordinator on the DPI risk assessment report for E-Rate as necessary and strive to minimize risk to DPI, school districts, and charter schools.

E-Rate Central

2.2 Vendor Experience

2.2.a) Have a minimum of 3 years experience serving as de facto state E-Rate coordinator.

E-Rate Central is the state E-Rate coordinator for the state of New York. We have been the state coordinator since 1998. Greg Weisiger served as state E-Rate coordinator for the commonwealth of Virginia from 1998 through August 2007.

2.2.b) Have a minimum 3 years experience serving on State E-Rate Coordinator Association (SECA).

E-Rate Central has represented New York State in SECA since its inception in 2000. Greg Weisiger has represented the commonwealth of Virginia in SECA since its inception.

2.2.c) Have a minimum 3 years experience with and access to USAC and the Federal Communications Commission (FCC) program administrators in the role as “trusted advisor.”

George McDonald, as Vice President of USAC, met regularly with FCC officials on E-Rate programmatic issues. Greg Weisiger represented the commonwealth of Virginia in testimony before the FCC on the Waste, Fraud, and Abuse hearings May 8, 2003. Winston Himsworth served on the USAC Waste, Fraud, and Abuse Task Force. Members of the E-Rate Central staff routinely visit Commission staff to council and advise on E-Rate matters.

2.2.d) Have state E-Rate coordinator staff physically located in the region – specifically in NC, SC, or Virginia.

The E-Rate Central Mid-Atlantic office will be the primary contact for these services. The office is located in Richmond, Virginia.

2.2.e) Have at minimum 3 years experience initiating E-Rate policy changes

E-Rate Central and staff members have been instrumental in affecting policy changes in the decade-old E-Rate program. Through appeals filed by staff members, the Commission has made cable modems eligible for funding, wireless NIC cards eligible, and required USAC to evaluate applications according to regulations in place at the time the applications were submitted. Through the rule-making comment process, we have argued in support of Hurricane Katrina relief, permanent use of BEAR Forms for retroactive reimbursements, and allowing Voice over IP services as eligible for funding.

2.2.f) Must have a minimum of 5 SME’s staff available via telephone and email for support Monday through Friday allowing for redundancy. Monday – Friday 8-5 EST.

E-Rate Central has 13 full-time employees with E-Rate experience. The primary contact for this contract will be Greg Weisiger in the Mid-Atlantic office. Secondary contact will be staff from the New York office, including Bretton Himsworth, Clifford Friedman, Joe Salvati, Winston Himsworth, and Christine Hoyler.

E-Rate Central

2.2g) Shall demonstrate E-Rate involvement at the applicant, state, and national level.

E-Rate Central files applications for approximately 160 applicants each year. We act as direct contact for all program review questions and complete all forms for applicants. E-Rate Central currently serves as state coordinator for the state of New York and our staff include former state coordinators for Virginia and Louisiana. One staff member is the former E-Rate coordinator for New York City. As mentioned, E-Rate Central staff have served on the national E-Rate Waste, Fraud and Abuse Task Force, testified before the Commission on May 8, 2003 and testified before Congress on October 5, 2004.

2.2.h) Shall demonstrate experience aligning State level master contracts for E-Rate eligible services.

As state coordinator, E-Rate Central works with the New York Procurement Department to ensure statewide contracts are E-Rate eligible by assisting with the filing of statewide Forms 470. We ensure contract expiration dates encompass the entire fund year and contract extensions are executed prior to the closing of the E-Rate application filing window. In 2005 USAC denied funding for a Virginia state master contract. The state coordinator contacted senior USAC staff and worked to quickly overturn the denial and ensure funding for schools and libraries in the commonwealth.

2.2.i) Shall not be a provider of E-Rate eligible services to the provider.

E-Rate Central does not provide E-Rate eligible services and does not act on behalf of any service provider.

2.2.j) Must have conducted at least 15 workshops over the past 3-5 years.

E-Rate Central staff conducts at least 15 E-Rate training sessions per year. During the past three years we have conducted between 40 and 50 sessions.

E-Rate Central

3. Business Specifications

E-Rate Central

3.1 Provided by Vendor

3.1.a) Project Manager

The project manager under this contract will be Greg Weisiger, E-Rate Central Mid-Atlantic Division, located at 14504 Bent Creek Court, Midlothian, Virginia 23112

3.1.b) Training for NCDPI staff

Staff members located in state regions should attend local training sessions. As necessary, E-Rate Central staff will be available for one-on-one or group sessions with DPI personnel and will be available via phone or email on a routine basis. This proposal includes up to three face-to-face sessions with E-Rate Central staff and NCDPI E-Rate staff members in the Raleigh area. We will be working closely with the state Coordinator on E-Rate compliance issues during the filing window and application review.

3.1.c) Communication Plan

The Primary Contact will be personnel in the E-Rate Central Mid-Atlantic office. Secondary contact will be the New York office. Sufficient personnel are available at each office to accommodate incoming calls or emails from North Carolina school districts or charter schools between the hours of 8:00 AM and 5:00 PM. Calls or emails will be returned within 24 hours.

Mid-Atlantic Contacts

Phone: (804) 302-4406

FAX: (804) 302-4407

Cell: (804) 892-1449

Email: gweisiger@e-ratecentral.com

New York Contacts

(516) 832-2880

(516) 832-2877

review@e-ratecentral.com

E-Rate Central personnel will call applicants in danger of losing funding because of missed filing deadlines during the last two weeks of October and first three weeks of November. We will call applicants during the last two weeks of January who have not filed invoices near the January 28, 2008 invoice deadline. E-Rate Central may hire part-time telephone operators to call applicants if necessary. A list of applicants in danger of losing funding will be included in weekly newsletters and will be available during training.

E-Rate Central

3.2 History of E-Rate Central

Tel/Logic Inc., d.b.a. E-Rate Central, is a specialized E-rate consulting firm that provides application, administrative, compliance, auditing, appeal, and technology review services for its clients. Since the E-rate program's inception in 1996, E-Rate Central has been involved with all aspects of E-rate at the local, state, and national levels.

E-Rate Central has a staff of professionals with a depth of E-Rate program experience that makes it a national leader in providing quality consulting and administrative services for schools and school districts. Services can be contracted on an hourly consulting basis or by contract for a specific project work scope. The company has a continuously expanding satisfied client base.

E-Rate Central is not affiliated with any technology service or equipment provider. Neither does the company make vendor recommendations to school districts or library applicants. The firm's main offices are located in Garden City, NY with three satellite offices in Virginia and Louisiana.

3.3) Mission Statement and Philosophy

E-Rate Central was established more than 10 years ago for the sole purpose of helping schools, school districts, and libraries successfully navigate the complex and time consuming rules and procedures of the Federal E-Rate Program. The overriding goal that drives our organization is simple. *Make the E-Rate program work for our clients.*

The E-Rate program is not a "file and forget" initiative. It requires ongoing vigilance of requirements and deadlines. E-Rate Central takes on the responsibility of being up-to-date on rule changes, new interpretations of rules, appeal decisions, and the current focus of audits and selective reviews. Our service includes planning, filing, defending, and the claiming of funds. We make a very complex E-Rate program simple for you.

E-Rate Central provides specialized E-rate consulting services to an entire spectrum of clients from very small districts and private schools to the largest consortia and complex urban districts across the nation. We understand the importance of E-Rate funding for all school districts and we work diligently to ensure that each of our clients receive the funding they are entitled to under the program's guidelines.

E-Rate Central has experience in working with multicultural districts and is sensitive to their unique needs and the issues they confront. It is part of our philosophy that one solution does not fit all situations and may not be appropriate for all school districts. Our objective, working within program guidelines, is to provide the maximum amount of options for our clients. We also are not reluctant to advocate for the modification of rules when that appears to best address program inequities or conflicts with local rules and practices.

The E-Rate Program is an important program that was enacted to ensure that all schools are able to take full educational advantage of this telecommunication age. Your school or school district's success is our success.

E-Rate Central

3.4) Company Contact Information

Headquarters Office:

E-Rate Central

625 Locust Street
Suite #1
Garden City, NY 11530
P. (516) 832-2880
f. (516) 8322877
whimsworth@e-ratecentral.com

Satellite Offices:

E-Rate Central

George McDonald
202 E. Alexandria Avenue
Alexandria, VA 22301-1808
P. (703) 350-6597
gmcDonald@e-ratecentral.com

E-Rate Central

Caroline LeBlanc
22495 Talbot Drive
Plaquemine, LA 70764
p. (703) 350-6597
cleblanc@e-ratecentral.com

E-Rate Central

Greg Weisiger
14504 Bent Creek Court
Midlothian, VA 23112
P. (804) 892-1449
gweisiger@e-ratecentral.com

Website:

www.e-ratecentral.com

E-Rate Central

3.5 Resumes

Winston E. Himsworth

Co-founder of E-Rate Central
Executive Director

Employment History

Over 30 years experience in telecommunications and education working with schools, carriers, manufacturers, regulators, and bankers in the areas of strategic planning, marketing, financing, and regulation. Strong quantitative skills supported by both business and academic experience.

TEL/LOGIC INC. d.b.a. E-RATE CENTRAL, Plandome, N.Y. 1987 to Present

President

Founded consulting firm to provide business development and present investment banking services for the telecommunications industry.

- Co-founded two entrepreneurial Personal Communications Services (“PCS”) companies.
- Acted as principal or consultant in numerous FCC spectrum auctions.
- Developed an educational service business (see <http://www.centraled.com>) to assist schools applying for universal service telecom discounts and to provide textbook logistical services.

E-RATE CENTRAL, Garden City, NY 1996 to Present

Executive Director

- President and founder of the E-Rate consulting firm, E-Rate Central that prepares E-Rate applications for almost 200 schools/school districts in regions of New York (Northeast Regional Information Center and Lower Hudson Regional Information Center), Pennsylvania, a school Foundation, (locations around the country) Illinois, and Ohio.
- One of the first E-Rate consultants in the nation when the program started in 1997.
- One of the founders of the nationwide State E-Rate Coordinator Alliance.
- Served on program administrators Task Force on Waste, Fraud, and Abuse (2003)
- Testified at Senate request in E-rate hearings before Energy and Commerce Committee (2004)
- Authored numerous writing on federal E-Rate program:
 - Numerous FCC comments on E-Rate NPRMs (2001 – 2005)
 - E-Rate articles published in technology publication
 - The nationally distributed E-Rate Weekly News and the E-Rate Service Provider Forum on a weekly basis
- Created dozens of presentations and presented nationally since 1998, including E-Rate training seminars conducted by E-Rate Central annually in NYS.
- In constant consultation and contact with all high level officials at the FCC, USAC, SLD, CBS, and PIA
- Reviewed over 400 technology plans for E-rate approval
- Prepared and filed all E-rate related forms since programs inception
- Represents many districts during the review, audit and appeal process

LEHMAN BROTHERS INC. New York, NY 1981 to 1988

Managing Director

- Built and managed the investment banking team serving the telecommunications industry.

E-Rate Central

- Transaction responsibility for a broad range of banking services: public debt and equity offerings, private placements and lease financings, note programs, acquisitions, and takeover defense.

SALOMON BROTHERS, INC., New York, N.Y. 1971 to 1981
Vice President

INTERNATIONAL BUSINESS MACHINES CORP., New York, N.Y. 1968 to 1970
Associate Marketing Representative

NEW YORK TELEPHONE COMPANY, New York, N.Y. 1962 to 1968
Engineer

UNITED STATES COAST GUARD 1963 to 1966
Lieutenant

Education and Awards

NEW YORK UNIVERSITY GRADUATE SCHOOL OF BUSINESS 1972 to 1978
Completed all course work for degree of Doctor of Philosophy, majoring in finance and quantitative analysis.

Awarded Advanced Professional Certificate – Finance, 1974
Degree of Masters in Business Administration, 1971
Majoring in quantitative analysis with a specialization in operations research.

BROWN UNIVERSITY 1958 to 1962
Degree of Bachelor of Science in Applied Mathematics
Graduated magna cum laude

George McDonald
Senior Consultant

The Telecommunications Act of 1996 created the “E-rate” program; which is administered by the Schools and Libraries Division (SLD) of the Universal Service Administrative Company (USAC). George McDonald was the most senior person responsible for all management of the SLD for four years (2001-2005). Prior to that, he had been the Director of Operations at the SLD for three years (1997-2001). As demonstrated by his management of the SLD, Mr. McDonald has unparalleled experience with the entire E-rate program, as well as leadership skills and a proven track record.

Employment History

E-RATE CENTRAL, Garden City, NY	July 2005 – Present
Director of Regulatory Affairs	
<ul style="list-style-type: none">Responsible for E-rate regulatory analysis, interpretations, commentary and updates regarding developing rules and regulations.Serve as Primary contact with the all federal agencies for E-rate, including but not limited to the Federal Communications Commission (FCC), USAC, and the SLD.Provide expert advice and guidance to all clients (from the prospective of the former head of the SLD) on how to comply with the E-rate program and deal with the numerous “grey” areas.Represent client’s best interests to help guide and formulate evolving E-rate program policies.Provide expert guidance regarding eligible services, forms preparation, compliance issues, audits, site reviews and appeals.Develop E-rate program evaluation criteria.Design and implement strategies to maximize E-rate funding.Analyze E-rate program strengths and weaknesses and develop processes to simplify the application process.	

SCHOOLS AND LIBRARIES DIVISION (SLD), UNIVERSAL SERVICE ADMINISTRATIVE COMPANY (USAC)	1997 – June 2005
The Schools and Libraries Division is directed by FCC regulation to administer the E-rate program, a \$2.25 billion per year program of discounts that provides schools and libraries access to advanced telecommunications services and the Internet.	
USAC Vice President	May 2001 – June 2005
<ul style="list-style-type: none">Managed the Schools and Libraries Division, which has an annual administrative budget in excess of \$60 million, a staff of 21 and a contractor staff of approximately 360. Responsible for the disbursement of up to \$2.25 billion annually.Acted aggressively to resolve bottlenecks in the processing of thousands of applications when first appointed to the position and rapidly reduced backlog. Reorganized staff to manage operations more effectively. Brought to resolution a long-standing contract dispute involving more than \$1 million.Served as primary liaison to multiple program stakeholders, including the Schools and Libraries Committee of the USAC Board, the FCC, state E-rate coordinators, the American Library Association E-rate Task Force, representatives of large phone companies and the general service provider community.Initiated, developed, and staffed a Task Force on the Prevention of Waste, Fraud and Abuse in	

Joseph R. Salvati 10/19/07 1:30 PM
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E-Rate Central

response to media reports of waste, fraud, and abuse in the program and congressional concern. The Task Force report was subsequently cited by the FCC as support for a number of significant rule changes.

- Provided support to a congressional investigation of waste, fraud, and abuse in the program. Testified at four congressional hearings about the steps USAC has taken to prevent waste, fraud and abuse.
- Implemented a major new initiative in 2004/2005 to conduct 1,000 site visits per year to improve communications with applicants and help prevent waste, fraud, and abuse.
- Oversaw responses to beneficiary audits conducted by USAC's independent audit department and the FCC's Office of the Inspector General.
- Oversaw the information technology systems that support program operations. Conducted a major overhaul of those systems over the course of several years.
- Worked closely with other USAC Vice Presidents, especially the VP for Internal Audits, the VP for External Affairs, the VP for Finance, and the General Counsel, to ensure USAC program objectives are achieved.
- Conducted an annual 2-1/2 day workshop to provide more than 100 representatives of 50 states and the territories with program updates and training materials for use in providing training in their states.
- Led staff in responding to inquiries from outside oversight agencies, such as the FCC, Congress, GAO, and OMB. Responses often required complex database queries and extensive research and analysis.

SLD Director of Operations, USAC,

Director of Operations, Schools and Libraries Corporation December 1997 – December 1998

January, 1999 – May 2001

- Took a lead in establishing the new Schools and Libraries Corporation in late 1997 and 1998.
- Developed a benefits program for employees.
- Worked with outside counsel to develop ethics and travel reimbursement policies.
- Had primary responsibility for development and implementation of procedures to ensure E-rate funds were committed and disbursed in accordance with FCC rules.
- Assisted with attest audit of internal control procedures by an independent auditor as directed by the Chairman of the FCC before disbursements could be made. The U.S. General Accounting Office was also asked to review the procedures by the Senate Commerce Committee in that same time frame. The attest opinion and GAO reviews were satisfactorily completed in November 1998.

U.S. DEPARTMENT OF TRANSPORTATION

OFFICE OF THE SECRETARY

1976-1997

- Deputy Director of the Office of Budget and Program Performance, August 1995 -December 1997
- Director of the Office of Programs and Evaluation, 1985-1995
- Program Analyst, Office of Programs and Evaluation, 1982-1985
- Program Coordinator and Transportation Specialist, Office of Environment and Safety, 1976-1982

NATIONAL HIGHWAY TRAFFIC SAFETY ADMINISTRATION

1972-1976

E-Rate Central

Education Research Specialist and Highway Management Specialist.

UNITED STATES AIR FORCE

Westover AFB, MA

1968-1972

KC-135 Navigator, Special Assistant to the Vice Wing Commander.

Education and Awards

University of Virginia, NDEA Fellow in American Government,

1967-1968

Fordham College, Bronx, NY B.A. (Mathematics),

1963-1967

Presidential Rank Award (Meritorious Executive), 1992. Presented by then-Transportation Secretary Andrew Card with the citation "Outstanding ability to broker agreement among diverse interests and produce a product acceptable to all parties."

Secretary's Award for Meritorious Achievement (Silver Medal), 1983

E-Rate Central

Bretton L. Himsworth

Co-founder of E-Rate Central
Vice President

Employment History

E-RATE CENTRAL, Garden City, NY	1997 to Present
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Director and E-Rate Specialist

- One of the first E-Rate consultants in the nation when the program started in 1997.
- One of the founders of the nationwide State E-Rate Coordinator Alliance.
- Oversee preparation of E-Rate applications for almost 200 schools/school districts in regions of New York (Northeast Regional Information Center and Lower Hudson Regional Information Center), Pennsylvania, a school Foundation, (locations around the country) Illinois, and Ohio:
 - Evaluate and insure all clients comply with numerous Form filing deadlines.
 - Collect and review information and complete FCC Form 470's for school districts.
 - Gather information and prepare FCC Form 471's for school districts.
 - Collect, analyze, and review information pertaining to discount rates, services requested, and budgetary information for school districts.
 - Collect and review annual invoices (Telecommunications, Internet, and Internal Connections), and verify all school districts are applying for eligible services on their reimbursement forms (FCC Form 472).
 - File FCC Form 486's after a school district is approved for E-Rate discounts in any given funding year. The FCC Form 486 is a confirmation to the SLD that services approved, will be utilized during the funding year.
 - Conduct FCC Item 25 reviews for school districts.
 - Perform NYS funding analysis for funding years 2003, 2004, and 2005.
- Provide E-rate advice, technical support and help line support for New York State applicants and service providers as the New York State E-Rate Coordinator (1997 – Present)
 - Responsible for assisting clients in on-site audits by the SLD and FCC.
- Providing support nationwide:
 - Providing daily phone/e-mail/fax support to vendors and applicants nationwide.
 - Reviewing over 200 FCC Form 470 and 471's for clients nationwide.
- Attending annual conferences (from inception to present):
 - (October) in Washington D.C. with the SLD and FCC.
 - (April) in Washington D.C. with SECA and the FCC.
- Review and respond to Program Integrity Assurance (PIA) and the Client Service Bureau (CSB) inquiries, and verify all information and answers provided are sufficient as per PIA and CSB request.
 - Responsible for writing appeals to both the FCC and SLD

Education and Awards

- Old Dominion University, Norfolk VA Bachelor of Science, Geography, 1995 Magna Cum Laude

E-Rate Central

Greg Weisiger
E—Rate Consultant

Qualifications:

State E-Rate Coordinator for the Commonwealth of Virginia since the inception of the E-Rate program:

- Train applicants and vendors on E-Rate procedures
- File statewide applications
- Remind applicants of pending E-Rate deadlines
- Assist applicants during application review and appeal
- Advise the Federal Communications Commission on E-Rate implementation issues

Participation rate for Virginia public schools averages 98 percent per year.

Virginia applicants utilize nearly 85 percent of funding each year. National average is about 75 percent

Highlights:

Conducted national teleconferences on E-Rate rules and regulations 1998, 1999, and 2000.

Maintain a mailing list of over 400 schools, libraries and vendors providing periodic updates on changes in E-Rate rules. Updates provide hints for filing successful applications and reminders of upcoming deadlines.

Testified before the FCC Waste, Fraud, and Abuse Forum on May 8, 2003. Outlined Virginia efforts to eliminate waste, fraud, or abuse by Virginia public school or library applicants and provided suggestions for improvement of the E-Rate program.

Filed many successful and precedent-setting appeals before the Schools and Libraries Division (SLD) and the FCC including:

- Franklin County making cable modems eligible for funding,
- Lunenburg County making wireless network cards eligible for funding,
- Williamsburg-James City County establishing that applications should be reviewed according to rules in effect at the time the application is filed,
- King and Queen County requiring the SLD to process applications that failed Minimum Processing Standards when required information was elsewhere on the application,
- Norfolk City overturning \$1.2 million COMAD for failed Item 25 review, and
- New Orleans arguing that the SLD improperly linked funding denials with questionable IBM applications.

Employment History

1993-2007 Virginia State Department of Education – Director, Teleproduction Services
1988-1993 The University of Virginia - Distance Learning Coordinator
1984-1988 Central Virginia Educational Television - Chief Engineer
1979-1983 United States Coast Guard - Electronics Technician

E-Rate Central

Clifford C. Friedman, Esq.
General Counsel & Compliance Officer
E-Rate Central

Employment History

E-RATE CENTRAL, Garden City, NY

July 2004 to Present

General Counsel & Compliance Officer

Responsible for implementing and monitoring all facets of the E-rate compliance program for all of E-Rate Central's clients.

- Prepare and file all E-rate related forms and documentation.
- Research all areas of E-rate substantive and procedural law, regulations, and interpretations.
- Provide counsel and represent school districts during Selective Reviews, Site Visits and other inquiries by the FCC, USAC, and SLD.
- Contribute to the E-Rate Weekly News and the E-Rate Service Provider Forum on a weekly basis.
- Expertise with the government's policies, procedures, and strategy relating to compliance investigations and reviews.

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UNITED STATES DEPARTMENT OF LABOR, New York, NY August 1993–July 2004

Employee Benefits Security Administration Staff Attorney

Initiate, plan, perform and coordinate civil and criminal investigations of ERISA Title I violations involving corporate and union retirement and health benefit plans.

- Provide recommendations for litigation regarding investigative findings concerning benefit plan administration, operation and investments.
- Conduct extensive depositions and audits of retirement plans, health plans and service providers.
- Negotiate and recommend compliance actions with plan officials, attorneys, accountants, bank officials, insurance officials and service providers to obtain voluntary compliance, monetary restitution and other remedial actions.
- Work closely with Regional Solicitor's office and the Department of Justice in preparing cases for litigation and providing expert technical guidance.
- Contact and maintain liaison with other federal, state and local agencies on ERISA related matters including, but not limited to, the IRS, PBGC, SEC and numerous state insurance departments.
- Prepare comprehensive audit reports regarding compliance with the Health Insurance Portability and Accountability Act ("HIPAA"), Women's Health and Cancer Rights Act ("WHCRA"), Newborns' and Mothers' Health Protection Act ("NMHPA"), Mental Health and Parity Act ("MHPA") and Consolidated Omnibus Budget Reconciliation Act ("COBRA").

Instructor
2004

August 1999 – July

- Responsible for training new Department of Labor employees in all regions of the United States in the following subject areas: reporting and disclosure, statutory exemptions, bonding, multiple employer welfare arrangements, participant rights, participant directed accounts, investment education and Sarbanes-Oxley Act.
- Created and implemented in-house training for the New York Regional Office in the areas of HIPAA, WHCRA, NMHPA and MHPA.

E-Rate Central

UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT Zagreb, Croatia *Financial Services Volunteer Corps*
October 2003

- Reviewed the legal and regulatory framework of Croatia's pension system and regulatory agency.
- Evaluated the procedures used for preparing and performing pension fund and service provider audits.
- Accompanied agents to field audits and collected documentation from pension fund, management company, investment manager and custodial bank.
- Analyzed pension regulatory agency structure, inter agency communications, procedures, manuals, operations, in-house training, public education and the enforcement process.

THE CITY UNIVERSITY OF NEW YORK, Borough of Manhattan Community College, NY
Adjunct Professor September 2003 – August 2003 Developed and led political science courses regarding the origins, institutions, and process of government and politics in the United States.

SUPREME COURT OF NEW YORK PART 34, New York, NY
Judicial Intern to Acting Justice Phyllis Gangel-Jacob May 1992 - September 1992
Education and Awards

HOFSTRA UNIVERSITY SCHOOL OF LAW, Hempstead, NY
Juris Doctor, May 1993

STATE UNIVERSITY OF NEW YORK AT ALBANY, NY
Bachelor of Arts, May 1989
Honors: Graduated Cum Laude, Dean's List

AWARDS:
United States Department of Justice Award for Public Service, December 1999

United States Secretary of Labor Exceptional Achievement Award, May 2001

ADMISSIONS: New York State Bar

Joseph R. Salvati
E-Rate Consultant

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E-Rate Central

Employment History

E-RATE CENTRAL, Garden City, NY

2002 to Present

E-Rate Consultant

- Consults with school districts in planning and successfully applying for Federal E-rate funding for Internet access to classrooms.
- Completes full range of E-Rate related forms.
- Assists school districts in preparing for scheduled audits.
- Participates in on-site audits and reviews.
- Writes both USAC and FCC appeals.

LEHMAN COLLEGE/NYC DOE

2002 to 2007

Teaching Fellows Program Liaison

- Reviews and supports teacher placement and the professional development of a cohort of individuals participating in the Teaching Fellows program. This is a collaborative effort that includes the NYC Department of Education, NYS Education Department, and several colleges.

NEW YORK CITY BOARD OF EDUCATION

Chief of Staff, Instructional and Information Technology

1998-2002

- Responsible, with the CIO, for the implementation and support of major instructional and information technologies for the NYC Board of Education.
- Coordinated the successful funding and implementation of an \$800 million, four-year effort to bring Internet access to 1.1 million students in 1200 schools and 400 offsite programs. More than 50 thousand classrooms were wired into a system-wide network that now allows students and teachers to extensively use Internet resources.

E-Rate Coordinator

1997-2002

- Represented New York City during implementation planning for the E-Rate Program
- Coordinated and implemented the first 5 years of applying for E-Rate discounts for the NYCDOE.
- Earned approval on hundreds of millions of dollars used to wire all NYC public school classrooms.

Distance Learning Education

1992-2002

- Member of the design team and director of programming for New York City's first fiber optic, video distance learning networks. This electronic community of 24 public schools, colleges and cultural institutions has been nationally recognized for bridging the social, psychological and geographical gaps in an urban educational setting. Have worked with more than 30 different museums, performance halls and science centers in developing distance-learning programming for schools.

Project Director for School Redesign

1987-1996

- Headed a nationally recognized program (Project Achieve) to redesign high schools in need of corrective action. This \$30 million per annum effort included development of a new school governance, instructional programs, support services, professional development and innovative uses of technology in 30 failing high schools.

Deputy Director of High School Special Education

1981-1987

- Had oversight for instruction and supervision in programs for handicapped students in more than 200 high schools. Created specialized curriculum including "Life Skills Guides" in major subject areas.

Supervisor of Instruction

1979-1981

E-Rate Central

Teacher (elementary, middle and high school) 1970-1979

COLLEGE OF NEW ROCHELLE / ADELPHI UNIVERSITY
MANHATTANVILLE COLLEGE

Adjunct Professor, Graduate Education 1982-2005

Education

- M.S. School Administration (Manhattan College, Riverdale NY) 1979
- M.S. Special Education (Manhattan College, Riverdale NY) 1977
- M.A. Political Science (St. John's University, Queens NY) 1972
- B.A. Liberal Arts (St. John's University, Brooklyn NY) 1968

Caroline LeBlanc

E-Rate Consultant

Employment History

E-RATE CENTRAL, Garden City, NY

2007- Present

E-Rate Central

E-Rate Consultant

- Consults with school districts and libraries to provide assistance in successfully applying for Federal E-rate funding to provide Internet access to classrooms.
- Has worked with school districts in constructing appeals and waiver requests filed with the FCC and USAC.

STATE LIBRARY OF LOUISIANA

2005 - 2007

Public Library Consultant, Technology Specialist

State E-rate Coordinator for public libraries in Louisiana

- Member of ALA E-rate task force.
- Project manager for installation of statewide library network.
- Represented Louisiana in a tri-state initiative requesting special E-rate assistance to areas affected by Hurricane Katrina.
- Represented the State Library of Louisiana on the E-Rate Katrina oversight committee in Louisiana.

IBERVILLE PARISH LIBRARY, Plaquemine, Louisiana

2004-2005

Assistant Director

- Network administrator for library system.
- Manage / organize all E-Rate applications and planning for library system.
- Administration of network / computer systems for system of eight library branches.
- Webmaster.

Technical Services Director

1999 - 2004

- Directed installation and implementation of the Library Corporation's integrated library system software.
- Assisted with administration of library system network / computer systems for the group of eight library branches.
- Webmaster.

Education and Certifications

- Certified Library Director (State Library of Louisiana) 2006
- M. L. I. S. Library and Information Science (Louisiana State University, Baton Rouge, LA.) 1993
- B.A. History, minor Journalism (Louisiana State University, Baton Rouge, LA.) 1991

Organizations

- Member of Louisiana Library Association and the American Library Association.
- Associate Member, Plaquemine Service League

Anthony White Jr.
E-Rate Consultant

Employment History

E-RATE CENTRAL, Garden City, NY

Aug. 2002 to Present

E-Rate Central

E-Rate Consultant / Coordinator

Prepare E-Rate applications for 71 schools/school districts in regions of New York (Northeast Regional Information Center and Lower Hudson Regional Information Center), Pennsylvania, a school Foundation, (locations around the country) Illinois, and Ohio.

- In the 2004 funding year, NERIC and LHRIC clients received close to \$5 million in E-Rate discounts
 - As a result of ERC efforts a school district received close to \$5 million in E-Rate discounts in 2004.
- Provide daily oversight and assistance to school districts with consultation support, including:
- Evaluate and insure all clients comply with numerous Form filing deadlines.
 - Collect and review information and complete FCC Form 470's for school districts.
 - Gather information and prepare FCC Form 471's for school districts.
 - Collect, analyze, and review information pertaining to discount rates, services requested, and budgetary information for school districts.
 - Collect and review annual invoices (Telecommunications, Internet, and Internal Connections), and verify all school districts are applying for eligible services on their reimbursement forms (FCC Form 472).
 - File FCC Form 486's after a school district is approved for E-Rate discounts in any given funding year. The FCC Form 486 is a confirmation to the SLD that services approved, will be utilized during the funding year.

Conduct FCC Item 25 reviews for school districts.

- Provide E-rate advice and help line support for New York State applicants and service providers as the New York State E-Rate Coordinator.
- Review and respond to Program Integrity Assurance (PIA) and the Client Service Bureau (CSB) inquires, and verify all information and answers provided are sufficient as per PIA and CSB request.
- Confirm that vendors filed a FCC Form 479, which certifies that they are a participating service provider in the E-Rate funding program.
- Perform NYS funding analysis for funding years 2003, 2004, and 2005.
- Review technology plans for compliance with E-Rate guidelines.

SCHOOLS AND LIBRARIES DIVISION (SLD), Whippany, NJ

Dec. 2001 – July 2002

Program Integrity Assurance Auditor

- Trained by the SLD on how to implement policies and procedures in reviewing FCC Form 471's (Form where services are being requested)
- Complete and process FCC Form 471 applications; following strict FCC procedural guidelines, using third party websites, internal databases, Pennsylvania/New York State Educational websites, and district/state approved technology plans.
- Evaluating the compliance of all applicants in the Schools and Libraries Universal Service Support program.
- Evaluating the compliance of eligible services (Telecommunications, Internet Access, and Internal Connections) applicants requested on their FCC Form 471.
- Responsible for contacting applicants and denying their FCC Form 471s on the basis of not complying with SLD guidelines.
- Consistent interaction with applicants concerning FCC Forms 470 and 471.
- Evaluate all site and district wide discount rates in compliance with State and SLD guidelines.
- Reviewing all backup documentation submitted to the SLD in regards to services being requested on the FCC Form 471.
- Analyzing all potential services on the FCC Form 470 that might be requested, while making sure the FCC Form 470 coincides with services being requested on the FCC Form 471.
- Responsible for contacting applicants to obtain additional documents supporting their funding request.

E-Rate Central

IBM CORPORATION, Piscataway, NJ

May 2001 – Oct. 2001

Financial Analyst

Education

B.A., Economics, Wheaton College, 2001

Alicia King
E-Rate Consultant

Employment History

E-RATE CENTRAL, Garden City, NY
E-Rate Consultant / Coordinator

January, 2000 to Present

E-Rate Central

Five years experience working with both applicants and vendors in providing comprehensive services covering all aspects of the E-Rate filing process.

- Prepare and submit appeal letters, Service Provider Identification Number (SPIN) change requests, service substitutions, change of invoicing mode, contact change letters, and other requests as needed to maximize E-Rate discounts
- Extensive experience dealing with applicants/service providers regarding the processes of seeking discounts or reimbursements by means of filing SPIFs (Service Provider Invoice Form) and BEARs (Billed Entity Applicant Reimbursement form)
- Respond to all inquiries requested by Schools and Libraries Division (SLD), Program Integrity Assurance (PIA) and the Federal Communications Committee (FCC)
- Advise Providers of eligible services regarding the E-rate procurement process
- Management of vendor relations from RFP (Request For Proposal) through implementation
- Inform and guide clients regarding the bidding process, including bid evaluation, related procurement planning, and RFP development
- State master contract guidance to both NY applicants and NY vendors
- Review Receipt Acknowledgement Letter for accuracy and submit corrections to SLD as needed
- Review Funding Commitment Decision Letter (FCDL) for accuracy
- Management of documentation retention requirements to ensure vigilance for any possible additional inquiry or audit of past application processes filed
- Provide guidance to schools regarding future funding potential for telecommunications, internet services, and internal connection projects

Interaction and advisement to applicants and vendors of program and procedural changes through the funding year/s to ensure compliance and conformity to changing state, SLD, and FCC rules, regulations, and E-Rate program guidelines

Technology Plan review to ensure sound operational strategies and facilitation of significant education and service advancements and that school district's are prepared to use requested services effectively

- Track approval of Technology Plan by designated technology plan approver and State agency as well as Technology Plan expiration dates.
- Review school policies for implementation and verification of compliance with Children's Internet Protection ACT (CIPA)

Education

STATE UNIVERSITY OF NEW YORK, COLLEGE AT NASSAU, GARDEN CITY, NY ASSOCIATE
DEGREE, ACCOUNTIN

Christine Hoyler

E-Rate Technology Planning Consultant

Employment History

E-RATE CENTRAL, Garden City, NY	1999 to Present
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E-Rate Technology Planning Consultant

Review Technology Plans for recommendation for New York State approval.

Mentor E-rate clients in the development of school or school district Technology Plans.

E-Rate Central

- Work in conjunction with appropriate school official to edit and/or revise a school or school district Technology Plan that is E-Rate compliant.
- Review Tech Plan on a regular basis to verify continued compliance with budgetary revisions, current Form 470 and Form 471 applications, and changing SLD requirements concerning Tech Plan requirements.

Review State-approved Technology Plan to verify compliance with E-Rate regulations.

Coordinator of Nassau BOCES Textbook Loan Program (2000-present)

- Coordinate a textbook loan program for the centralized distribution of textbooks to private schools on behalf of 51 of Nassau County's 56 school districts;

Manager of Y2K Planning Service (1999-2000)

Managed Y2K technology planning service for 40 school districts including development of database-driven Web site for compliance data.

Long Island University, C. W. Post Campus, Brookville, NY

1994-1999

Programs Manager of the Department of Educational Technology (1996-1999)

Adjunct Faculty in the Department of Educational Technology (1994-1999)

- Teaching Computer Literacy to undergraduate education majors and Team-teaching in graduate courses involving research, writing and educational integration of technology.

Education and Awards

Long Island University, C. W. Post Campus, Brookville, NY

Master of Science, Computers in Education

- Grade point average: 4.0/4.0
- Dept. of Educational Technology Outstanding Student Award, May, 1994

Beaver College, Glenside, PA

Bachelor of Arts, History, Dean's List

Bruce Conlin

E-Rate Specialist/Coordinator for E-rate Discounts

Employment History

E-RATE CENTRAL, Garden City, NY

2001 to Present

Specialist/Coordinator for E-rate Discounts

Manage and coordinate programs to facilitate and maximize E-rate discount rates for our E-rate school/library.

E-Rate Central

Work in conjunction with appropriate school official to evaluate methods available to maximize E-rate discounts and to insure E-Rate compliance.

Mentor and advise as necessary on various discount methods best applicable to the school/library:

- National School Lunch Program (NSLP), eligible students as opposed to participation;
- Implementation of confidential family income surveys to include compilation of data and procedures;
- Utilization and application of Medicaid, food stamps, Supplementary Security Income (SSI), Temporary Assistance for Needy Families (TANF), Low income Home Energy Assistance, Department of Housing and Urban Development to name some of the various sources;
- Sibling Search – organize and initiate procedures for identification of siblings of confirmed eligible low income students to further increase percentage of eligible entities.

Insure that unacceptable or unauthorized discount method procedures are not utilized. Methods such as: projection of high school facilities based on feeder school data; extrapolation of random sampling; Title 1 eligibility.

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Coordinator of Nassau BOCES Textbook Loan Program

- Coordinate a textbook loan program for the centralized distribution of textbooks to 'participating' private schools on behalf of 50 of Nassau County's 56 school districts.

Education

Dowling College, Oakdale, NY
Minor Business

Bachelor of Science, Aeronautics

3.6 School District References

Nassau County BOCES

Number of Districts:	56 small to medium districts
Number of Schools:	375 total
Number of Students:	213,892
2007 Total Funding Requested:	\$ 7,494,096.89
Request Type:	Priority 1 and 2

E-Rate Central

Tony Carfora
Supervisor of Telecommunications
& E-rate Program
71 Clinton Road
Garden City, NY 11530
516-396-2257
tcarfora@nasboces.org

Pitt County School District, NC

Number of Schools: 129
Number of Students: 71,616
Request Type: Audit Review and Training

Dr. Beverly Reep, Superintendent
Superintendent
Pitt County Schools
1717 West 5th Street
Greenville, NC 27834
252-830-4239

Albuquerque Public Schools (New Mexico)

Number of Schools: 130
Number of Students: 86,000
Number years as client: 1
2007 Total Funding Requested \$ 8,159,631.37
Request Type: Priority1 and 2

Dale Alexander
Director of Technology & Communications
6400 Uptown Blvd NE, Suite 550E
Albuquerque, NM 87110
505-830-8040
alexander_d@apsnet.net

Fairfax County Public Schools (Virginia)

Number of Schools: 196
Number of Students: 161,000
2007 Total Funding Requested \$4,576,065
Request Type: Priority One

Deborah Sansone
4107 Whitacre Road V-26
Fairfax, VA 22032
703-426-8863
Debbie.Sansone@fcps.edu

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4. Work Statement

Work Statement

- E-Rate Central has detailed the deliverables for this contract in Section III Technical Specifications. Work will be accomplished with one Full-Time Equivalent for the first year of the project.
- While conducting regional training, Mid-Atlantic office telephone reception will be augmented by staff in the New York office. During the period between November 1 and

E-Rate Central

February 15 it may be necessary for E-Rate Central to hire part-time telephone operators to call applicants and remind them of pending deadlines. In the event the applicant has immediate questions, the operator will forward the call to E-Rate Central subject matter experts.

- Weekly newsletters are generated from the New York office and will be customized by Mid-Atlantic staff with North Carolina specific information. As new district or school E-Rate contacts are discovered, we will update mailing lists and inform the state Coordinator.

E-Rate Central

5. Training Plan

Training Plan

| Training will be conducted as outlined in Section II, *2.1.e* above. The E-Rate Central trainer (nominally Greg Weisiger) will coordinate with the state Coordinator dates and locations for training. Information on training dates will be included in a weekly newsletter or other communication to DPI. When calling applicants regarding Form deadlines, E-Rate Central staff will inform applicants of upcoming training opportunities. Ideally, training sessions will conclude prior to the first week of December to give applicants sufficient time to file Forms 470, secure contracts and file Forms 471 prior to the closing of the filing window.

E-Rate Central

Training will typically be conducted from 9:00 am to Noon for beginners with an hour break for lunch. The afternoon session will run from 1:00 PM until approximately 3:00PM and will be available for both beginners and veterans.

The beginner's session will include a basic overview of the program, basic regulations such as technology plan requirements, Children's Internet Protection Act requirements, an overview of required forms, eligible services, document retention requirements, audits, and appeals.

The veteran's session will briefly recap basic program requirements and timelines. Additional items covered will include Technology Plan timing and approval, bid evaluation, memorialization of existing contracts, the 2-in-5 rule, leasing of equipment as Priority 1 service, Item 21 Attachments, Vendor Capital expenses, economic reasonableness, selective reviews, audits, commitment adjustments, Red Light rule, and questions and answers.

E-Rate Central will provide a presenter laptop computer, a projector and 30 handouts per session.

6. Cost Response

6. Cost Response

SME/Staff Support Costs:

\$4,000/month for general support costs

\$2,000/month for FAX, email, and telephone help line support for E-Rate applicants

\$72,000 One Year Total

E-Rate Central

E-Rate Training Costs:

\$2,000/day x 9 days of training

- (6 days of training for LEAs and 3 days of training for NCDPI staff)
- Travel and material costs are included.
- Additional training will be provided at \$2,000/day

\$18,000 One Year Total

Other Costs (Vendor please specify):

\$2,000/day per person x 3 days onsite support

- Travel and material costs are included.
- Additional onsite support will be provided at \$2,000/day per person

\$6,000 One Year Total (3 days * one person)

\$96,000 One Year Total

E-Rate Central

7. Financial Statement

E-Rate Central

E-Rate Central

8. Conflict of Interest Statement

E-Rate Central

Assurance of No Conflict of Interest

E-Rate Central is an E-Rate Consulting firm specializing in all aspects of the E-Rate application process. We are vendor neutral and do not have a USAC/SLD SPIN vendor number. We comply with all FCC/USAC rules and guidelines regarding our role as consultant. We have an impeccable record of performance and take pride in what we have achieved for our clients and the students they serve.

No assistance was sought or received by any current or former employee of the State of North Carolina whose duties related to this RFP, unless such assistance was provided by the state employee in his or her official public capacity. No employee of the State of North Carolina has any interest in the outcome of this RFP. Also, no E-Rate Central employee, or any member of his or her immediate family has any financial interest in the outcome of this RFP.

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9. Samples and Examples

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E-Rate Central

E-Rate Central

E-Rate Central

E-Rate Central