

Special Report on Prior Year E-Rate Commitments Which May Offer Opportunities for Firms With Non-Eligible E-Rate Products and Services

A Technology Monitoring and Information Service (TechMIS)
SPECIAL REPORT

Prepared by:
Education TURNKEY Systems, Inc.
256 North Washington Street
Falls Church, Virginia 22046-4549
(703) 536-2310 / (703) 536-3225 FAX

June 30, 2004

The enclosed list of districts receiving E-Rate funding commitment letters for prior years may offer TechMIS subscribers opportunities for purchases of non-eligible E-Rate products and services such as software, staff development, and computers. The prior year commitments may have been a result of appeals made over the last two years or even earlier which have been found to be “meritorious” by the SLD. In these cases, the E-Rate applicants may have paid the pre-discount rate for eligible products and services and hence, could request a check in lieu of a credit for the discount amount, if it went through the Form 472 BEAR reimbursement process. If a potential customer is interested in purchasing a product but does not have adequate funding, these potential customers should be advised to contact the district E-Rate office to determine whether the Form 472 BEAR process has been used to request a check in lieu of a credit and, if so, to explore the possibility of such discount reimbursements to be used to purchase the product. We wish to emphasize that, in some cases, the district may have waited until the results of the appeal were known before purchasing the product and obviously would not have paid the prediscount price and be eligible to proceed with the BEAR process.

Appendix A presents commitments of E-Rate funds to school districts and libraries that did not fall within the regular funding waves. Only commitments in excess of \$50,000 have been listed. Appendix A represents commitments made in the first quarter of the School and Libraries Division’s year (which corresponds to the calendar year) -- January through March 2004. These commitments cover funds from as early as 2000 and include E-Rate reimbursements that were not committed during the regular funding waves because of late applications, appeals, etc.