

Training Next-Generation State E-rate Coordinators: Building Expertise & Improving Effectiveness

Introduction

Chief Officers of State Library Agencies¹ (COSLA), in partnership with members of the American Library Association E-rate Task Force² (ERTF), requests \$249,999 from the Laura Bush 21st Century Librarian Program (LB21) to develop, deliver, and evaluate two multi-day in-person training events for state E-rate coordinators, which will be known as *Training Next-Generation State E-Rate Coordinators*. This is a two-year implementation project that aligns with LB21 Program Goal 3: to enhance the training and professional development of the library workforce to meet community needs. Because our project is focused on state coordinators of E-rate, it will support LB21 Objective 3.4: support training of the library and archival workforce to advance digital inclusion for the benefit of community members.

E-rate is the single largest federal program addressing access, affordability, and digital inclusion in libraries. In fact, it is one of the largest federal programs for digital equity,³ surpassing even the funding of the Digital Equity Act.⁴ In the current year, there is up to \$4.456 billion available in E-rate program funding;⁵ yet, none of that funding is available for training dedicated to state coordinators for libraries. In the meantime, because states have lacked resources to adequately help libraries with the E-rate process, a large E-rate consulting industry⁶ has developed. A consultant-based model of support means the smallest and most economically disadvantaged libraries have the least access to the help they need to navigate the E-rate program. Through this grant, we plan to recalibrate that playing field, utilizing a few of those consultants to build and facilitate a boot camp for state library coordinators. Furthermore, we will maximize the training opportunity by using an in-person format for the dual purposes of knowledge gain and development of the community of practice.

The core project team includes Jeremy Johannesen, COSLA Executive Director as Lead Applicant and Christine Morris, ERTF Vice Chair and COSLA Community of Practice (COP) Co-Administrator as Project Director. COSLA staff, in their roles as employees of AMR Management Services,⁷ will provide administrative support of the project, including fiscal and event logistics services. Lauren Abner, ERTF Chair, and Henry Stokes, COSLA COP Co-Administrator and ERTF Member, will coordinate the archiving of training materials on COSLA Stacks, the online community space for the COSLA COP. Development of the project will continue to be advised by additional ERTF members, including Robert Bocher, Lauren Cardinal, Cindy Church, Christine Gauvreau, Amber Gregory, Sharmaine Frazier, Jared Leadbetter, Malavika Muralidharan, and Valerie Oliver. The selected Training Consultants, Aleck Johnson and Linda Schatz from EdTech Strategies, LLC,⁸ will engage in outreach to state coordinators to develop curriculum to the unique and unaddressed needs of state E-rate coordinators for libraries.

Project Justification

Background

E-rate is a federal program that was established as part of the Telecommunications Act of 1996. The concept of E-rate is fairly simple: telecommunications services providers are required to pay a portion of their revenues into the Universal Service Fund (USF), which is distributed across four programs that were designed to promote equitable access to telecommunications services nationwide. The Federal Communications

¹ <https://www.cosla.org>

² <https://www.ala.org/aboutala/committees/ala/ala-ertf>

³ <https://www.fcc.gov/general/e-rate-schools-libraries-usf-program>

⁴ <https://broadbandusa.ntia.doc.gov/funding-programs/digital-equity-act-programs>

⁵ <https://www.fcc.gov/consumers/guides/universal-service-program-schools-and-libraries-e-rate>

⁶ <https://e-mpa.org/about>

⁷ <https://amrms.com>

⁸ <https://edtechstrategies.net>

Commission (FCC) is the federal agency in charge of the USF, and they delegate the day-to-day work of the programs to the Universal Service Administrative Company (USAC), a not-for-profit organization. One of the four programs funded by the USF is E-rate, which subsidizes internet access through a discount program for schools and libraries across the country.

E-rate is a highly successful program: libraries are able to serve their communities better because of the tiered support of the E-rate program, which discounts up to 90% of internet costs for libraries in the most economically disadvantaged communities. Additionally, the FCC's recent and proposed expansions of E-rate programs into new tribal library opportunities, Wi-Fi hotspot lending programs, and cybersecurity initiatives demonstrate the E-rate model as a proven method of supporting libraries and schools.

However, while E-rate is a simple program in concept, it is highly complex in its execution. There is a significant discrepancy between schools' and libraries' participation in E-rate: 76% of E-rate funds go directly to schools, while only 5% go directly to libraries.⁹ The remaining 19% go to consortia, which are more frequently school consortia. This is due to a variety of reasons. First, it seems the program was created with schools foremost in mind as illustrated by its calibration to the school year schedule, requirements for adherence to the Children's Internet Protection Act¹⁰ (CIPA), and its focus on school entities in the program structure¹¹ and jargon.¹² Libraries often do not see themselves in this program, especially at first glance.

Second, it is very difficult and time consuming to apply for E-rate. Libraries, especially small rural ones who need the discount the most, frequently lack the capacity. Those libraries may be staffed by as few as one person, and that person usually does not have advanced credentials, like an MLS. Without adequate time, expertise, or political relationships, they often have difficulties navigating their local government purchasing department rules, a crucial part of the E-rate process. They don't often have in-depth IT knowledge, which is also an important factor when applying for E-rate. On the other hand, even the smallest school district administrations consist of multiple people, usually including IT and procurement professionals at the least.

Despite being better resourced, even schools still struggle with the E-rate program, which has resulted in the creation of a large and quite in-demand, nationwide E-rate consulting industry. These consultants charge fees for that work, often taking a percentage of the amount that an E-rate applicant receives in exchange for filing the forms and assisting schools or libraries through the application process. This diminishes the net benefit of the E-rate program savings, and working with a consultant still requires time and effort on the part of the applicant.

Given those implicit and explicit costs, libraries with limited staff and budgets very often do not bother with the E-rate program. That means that millions of dollars that are available to libraries and designated to the E-rate program go unused each year, for lack of a few simple supports. One of the simplest solutions to that need for support is state library agency E-rate coordinator staff.

Early in E-rate history, state coordinator staff were required to review and approve technology plans. That is no longer required, so some states have moved away from in-house support for libraries; however, most state agencies still maintain at least a partial position for E-rate support and all states maintain a designated library

⁹ Open Data analysis, FY2023

¹⁰ <https://www.fcc.gov/consumers/guides/childrens-internet-protection-act>

¹¹ <https://www.usac.org/e-rate/applicant-process/applying-for-discounts/calculating-discounts>

¹² <https://www.usac.org/e-rate/applicant-process/before-you-begin/non-instructional-facilities-nifs>

contact with USAC. These state coordinators represent our opportunity to turn the tide for libraries and the E-rate program.

IMLS has acknowledged the importance of the E-rate program, as well as other FCC initiatives, in addressing the digital divide. On June 24, 2022 the Director of IMLS and Chair of the FCC announced a Memorandum of Understanding (MOU) between the two agencies to “jointly promote public awareness of federal funding opportunities for broadband.” In announcing the MOU, the FCC Chair even went so far as to say, “Internet access is essential for modern life. We need to make sure everyone, everywhere, has a chance to connect.”

Given the importance of the E-rate program to addressing the digital divide, it would stand to reason some special attention might be given to supporting libraries to navigate the twenty-three pages of rules that define the program,¹³ or the online portal known as the E-rate Productivity Center (EPC)¹⁴ that is used to file E-rate forms and communicate with the USAC staff regarding E-rate processes. Unfortunately, there is no training that is specific to the needs of libraries other than that which is provided by state coordinators or consultants contracted at a state level.

Furthermore, there is no training at all to address the unique role of library state coordinators. There are duties of state coordinators and capabilities of their access to the E-rate program that differ greatly from general applicant interaction with the E-rate and the E-rate Productivity Center. State coordinators also have a greater interest in resources like the Open Data¹⁵ portal, a complex statistical storehouse of program data back to 2016. Finally, state coordinators are always looking ahead with regard to program rules, to try to interpret that information for their constituents.

The State E-rate Coordinator’s Alliance¹⁶ (SECA) provides training, but it is only open to state E-rate coordinators for schools, not state coordinators for libraries. While the historical reasons for that distinction are lost, it is true that libraries possess needs and perspectives unique from schools. Libraries do not function *in loco parentis*, and therefore have a different perspective on CIPA. Many states have rules that require a level of end-user privacy which do not apply to schools.

State coordinators for libraries have relied heavily on informal networking and a listserv sponsored by ALA to try to fill the gap, but there has been a great loss of institutional memory and state coordinator capacity since the beginning of the pandemic. In June 2022, the ERTF surveyed current state coordinators and found that over one quarter of the respondents had less than one year of E-rate experience, and over half cited less than five years of experience. Additional turnover among state coordinators has occurred since that time.¹⁷

Meanwhile, the environment for digital equity is also in a great state of flux: states are grappling with the opportunities and challenges of multiple federal programs for broadband funding; the role of Community Anchor Institutions (CAIs)¹⁸—including libraries—is up for debate; and new opportunities for libraries in FCC funding resources seem to be on the horizon with every speech that FCC Chairwoman Rosenworcel makes.^{19,20} New, specific E-rate opportunities for tribal and small libraries are in development as well. Without state agency staff who are adequately trained in E-rate coordination and program administration, opportunities

¹³ <https://www.govinfo.gov/content/pkg/CFR-2023-title47-vol3/pdf/CFR-2023-title47-vol3-part54.pdf>

¹⁴ <https://www.usac.org/e-rate/resources/e-rate-productivity-center>

¹⁵ <https://opendata.usac.org/stories/s/E-rate-Tools/bneq-mh8b>

¹⁶ <https://secaerate.net>

¹⁷ Please refer to the 2022 and 2024 State Coordinator Survey summaries in the Supporting Documents.

¹⁸ <https://uscode.house.gov/view.xhtml?path=/prelim@title47/chapter16/subchapter2&edition=prelim>

¹⁹ <https://docs.fcc.gov/public/attachments/DOC-394619A1.pdf>

²⁰ <https://docs.fcc.gov/public/attachments/DOC-395069A1.pdf>

will be lost for libraries to make their greatest impact on the digital divide since the early days of public internet accessibility.

The E-rate program is critical to connecting communities across the country through their libraries, and it ensures opportunities for education, workforce participation, career advancement, civic engagement, social interaction, government services, and healthcare access to millions of Americans who rely on their library for their connectivity needs.

Libraries are trusted institutions in communities across the country. With over 123,000 library locations nationwide, libraries provide critical access to services for students, families, jobseekers, seniors, and more. Our libraries contain a multitude of important resources and materials, with which individuals are able to build skills, prepare for college and career, participate in literacy-focused programming, and increasingly, access needed technology and equipment for 21st century participation. Crucially, this includes access to the internet, which is vital infrastructure for modern life. With limited budgets and staffing capacity, many libraries would not be able to meet their community's connectivity needs without E-rate.²¹

This is a singular moment for libraries and digital access.

Previous Work and Recent Research

This project is based on a combination of two proven, effective models for state coordinator training. The initial inspiration was a re-imagining of the training funded by the Gates Foundation and developed by the ALA Office for Information Technology Policy in 2008 and 2009. Of the few remaining state coordinators who were active at that time, all of the members of the ERTF who attended that training still note its impact on the work they do today.

This training, which was focused on improving library E-rate participation, included two multi-day sessions and travel stipends for all participants through grant funding of \$950,000.²² While many of the details of these events are lost to public record, an interview with one of the conveners revealed many of the most important parts. The focus of the Gates-funded training was to engage with state coordinators through an in-person cohort model, with a special emphasis on meeting the participants "where they were" with regard to knowledge and experience: the first day of the first session was focused on program basics for the numerous state coordinators with minimal experience. The purpose of the program was to broaden the expertise of individual participants and encourage sustainability of the community knowledge base by spreading it across a cohort.

The second inspiration for this project is the COSLA Forum model for State Library Agency specialists. Currently, COSLA facilitates an annual Continuing Education (CE) Forum for state library agency staff in charge of CE for librarians. These events are coordinated by volunteers from the state library agencies, supported by COSLA staff for logistical planning, and supplemented by expert guest speakers.

In-person applicant training by USAC in October 2023 inspired enthusiasm among state coordinators. Although registration was limited, several state coordinators for libraries were able to attend. A recent survey of the state coordinators indicated that even more were interested in attending but were unable due to the scarcity of seats available and lack of support for professional development travel.²³

²¹ <https://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/telecom/erate/Libraries%20and%20E-rate%20-%20January%202018%20Brief.pdf>

²² Oder, Norman. "\$950K Gates Grant To Help with E-Rate." *Library Journal*, vol. 133, no. 1, Jan. 2008, pp. 20–22.

²³ Please refer to the 2024 State Coordinator Survey Summary in the Supporting Documents.

State library agencies are under increasing budgetary pressure. Many have greatly reduced their budget for staff training and travel; some have eliminated out-of-state travel entirely. The same survey cited above indicated that nearly a quarter of respondents lack state agency resources for professional development travel. Without substantial travel support for state coordinators, it will be impossible to convene the majority of those coordinators for in-person training at this time.

Alternatives to in-person convening for the state coordinators have been considered in the development of this proposal, not only because of that financial barrier, but also because of other accessibility concerns. However, recent research indicates that in-person training yields stronger learning outcomes than synchronous virtual training.²⁴ Additionally, in our planning conversations, the selected Training Consultants have noted that their experience with in-person events have benefited from the more candid and open conversations that take place when presenters and participants are not recorded. The confidentiality that comes from keeping the exchange of ideas off-line is important to this learning experience.

Along those same lines, in our recent survey the potential cohort expressed a strong preference for in-person training as the optimal learning environment. Reasons cited include:

- Easier to ask for help
- In-person is more immersive
- Building connections and trust in-person
- Networking
- Building a support group
- Energizing
- Feedback is more extensive; can see non-verbal cues better and react to them
- Builds community

As we work to build a foundation for sustainability and a true community of practice and mentorship, these are all attributes that will be key to that success.

Broad Impact and Sustainability

Without the support of E-rate state coordinators for libraries, many small and under-resourced libraries would not be able to navigate the complexities of this vital program. For example, the median number of staff for a town/rural library in 2021 was 1 full-time staff member and 3 part-time staff members.²⁵ With limited staff capacity, many libraries simply do not have the time or expertise to apply for E-rate or other funding support; E-rate state coordinators thus play an essential role in ensuring libraries are able to access the E-rate discounts, and further, that the communities they serve are connected with robust internet services.

Our project calls on LB21 funds to kick-start a program for state E-rate coordinators by utilizing Training Consultants to provide much-needed momentum. Several members of the ERTF have been trying to develop an "E-rate Byte Camp" of short, online training modules since 2022. However, while those members have a depth of expertise, they do not have the capacity to develop, publish, and maintain online training modules in addition to their regular state coordinator workload. Thus, we are asking for funds for an initial boost to establish both a curriculum and a process, as well as help state library agencies prioritize training and give state library agencies a reason to prioritize training for their E-rate coordinators in the future.

Project Work Plan

Project Goals

²⁴ <https://www.tandfonline.com/doi/full/10.1080/08923647.2022.2029090>

²⁵ https://www.ala.org/pla/sites/ala.org.pla/files/content/data/PLA_Staff_Survey_Report_2022.pdf

This project has five distinct, but interrelated, deliverables: 1) a multi-day, in-person training event in 2024 for state E-rate coordinators 2) training material development for the community of practice, 3) a series of first-year assessments, 4) a second multi-day, in-person training event in 2025 for state E-rate coordinators, and 5) a series of second-year assessments that will serve as the blueprint for sustainable state coordinator training. These will be developed by the project team over the course of six phases.

Project Team

- The Project Director will coordinate the work of COSLA, the ERTF, and the Training Consultants to meet the goals and objectives of the grant.
 - Christine Morris is the Digital Resources Manager at the Ohio Public Library Information Network, the ALA ERTF Vice Chair, and COSLA COP Co-Administrator. Her previous experience in leadership training events includes co-managing the Library Leadership Ohio program and serving as a mentor and steering committee member for the ILEAD-USA Ohio program. Ms. Morris's previous grant experience includes primary responsibility for over \$300,000 in Gates Foundation and LSTA funds.
- The Grant Administrator will coordinate the contracts, finances, and reporting for the grant.
 - Jeremy Johannesen is the Executive Director at COSLA. He will serve as the grant administrator of record and the coordinator of COSLA staff work on the grant.
 - Additional COSLA staff will provide administrative support of the project, including fiscal and event logistics services.
- The Training Consultants will be EdTech Strategies, LLC
 - Aleck Johnson, VP of EdTech Strategies, has worked in the education and information technology policy field for over 25 years, and has worked closely on E-rate issues since 1996.
 - Linda Schatz, President of EdTech Strategies, brings more than 35 years of library and education technology experience to EdTech Strategies. Before co-founding EdTech Strategies, she was the Vice President of Outreach and Education for the Schools and Libraries Division of USAC.
- Digital Archiving and Sustainability will be coordinated by the ERTF Chair and COSLA COP Co-Administrator
 - Lauren Abner, ERTF Chair, Technology Consultant at Kentucky Department for Libraries and Archives, has been serving the libraries of Kentucky since 2011 and specializing in E-rate since 2015. Besides providing E-rate consultation, she consults with libraries on their broader technology needs and monitors Library Services and Technology Act (LSTA) funds for the state.
 - Henry Stokes, COSLA COP Co-Administrator, ERTF Member, Digital Opportunity Program Coordinator at Texas State Library and Archives Commission, and State E-rate Coordinator for Texas libraries, leads a team devoted to supporting statewide library digital inclusion efforts. For over fifteen years, he has provided training and consulting to Texas library staff with a focus on broadband and emerging technologies.
- The Project Advisory Team will include other members of the ERTF. Their expertise in E-rate will assist in the development of the training events, assessments, and digital products for the COSLA Stacks.
 - Robert Bocher,²⁶ Senior Fellow at the American Library Association
 - Lauren Cardinal,²⁷ E-rate Coordinator for Libraries at the New York State Library
 - Cindy Church,²⁸ Continuing Education Consultant at the Library of Virginia

²⁶ <https://heritage.wisconsinlibraries.org/entry/robert-bob-bocher-2018-library-hall-of-fame-inductee>

²⁷ <https://www.linkedin.com/in/lauren-cardinal-b395aa48>

²⁸ <https://www.linkedin.com/in/cindy-church-1290a1a>

- Christine Gauvreau,²⁹ LSTA & E-rate Coordinator at the Connecticut State Library
- Amber Gregory,³⁰ Manager of E-rate Services at the Arkansas State Library
- Sharmaine Frazier,³¹ State E-rate Coordinator for Libraries at the Mississippi Library Commission
- Jared Leadbetter,³² Technology Consultant & State E-rate Coordinator at the Maine State Library
- Malavika Muralidharan,³³ E-rate Administrator at the Arizona State Library
- Valerie Oliver,³⁴ E-rate Consultant at the Alaska State Library

Phase 1: Design and Planning

Due to the timing of the LB21 grant cycle and the E-rate funding cycle, at least some of the design work will need to be done as planning activities. The Project Director and Grant Administrator will work with the Training Consultants to develop the contract, program deliverables, and timeline. Depending on the negotiation of the contract, the Training Consultants may engage with the Project Advisory Team on the pre-event assessment and curriculum. The Grant Administrator and COSLA staff will determine event logistics, such as siting the event and preparing contracts for execution. The Project Director and Grant Administrator will establish the mechanism for awarding travel stipends to training participants.

As soon as the grant is awarded, contracts with the Training Consultants and event location will be executed, and the travel stipend window will be opened. The pre-event assessment will be distributed to all state coordinators as far in advance of the event as possible, to allow the Training Consultants to tailor the event curriculum to the specific needs of the state coordinator cohort at this time. The Training Consultants have included outreach activities in their request for information (RFI) proposal to ensure the greatest possible level of impact.

Phase 2: First Event

Due to the timing of the LB21 grant cycle, the event itself will need to take place in November 2024. The precise schedule for the event will be subject to the combined determination of the Training Consultants, Grant Administrator, and Project Advisory Team. The proposed schedule from the Training Consultants includes an introductory session for new state coordinators, instruction on the online portal for E-rate, guidance on state level train-the-trainer events, coverage of the more complicated aspects of E-rate, and an in-person evaluation session.

Phase 3: Training Material Development

Conference handouts and other supporting materials will be archived by the COSLA COP Administrators in the COSLA Stacks information sharing platform. The COP Administrators will work with the Training Consultants and the Project Advisory Team to plan for additional digital products as needed.

Phase 4: First Year Assessment

In addition to the in-person evaluation of the event, the Project Director will distribute three quarterly online assessments as follow-up to the event in December 2024, March 2025, and June 2025. This feedback will inform the last phase. Additionally, the Project Director will create a summary report of the activity on both the ALA Connect State E-rate Coordinator listserv and the COSLA Stacks online Community of Practice.

²⁹ https://libguides.ctstatelibrary.org/prf.php?account_id=221919

³⁰ <https://www.libraryjournal.com/story/amber-gregory-movers-shakers-2021-advocates>

³¹ <https://www.linkedin.com/in/sharmaine-frazier-82b68059>

³² <https://northernforest.org/library-internet-access>

³³ <https://www.linkedin.com/in/malavika-muralidharan-43904a3>

³⁴ <https://www.aklib.net/erate/?author=2>

Phase 5: Second Event

The second event will be scheduled in late summer 2025. It will follow a similar format to the first event in November 2025, with adjustments as indicated by evaluation data. The second event will include a group activity designed to commit to the sustainability of future state coordinator training and transition it to a regular COSLA-sponsored event.

Phase 6: Second Year Assessments

In addition to the in-person evaluation of the event, the Project Director will distribute online assessments as follow-up to the second event in September 2025, December 2025, March 2026, and June 2026. This feedback will establish the requirements for sustaining the educational outcomes. The Project Director will create summary reports of the activity for both the ALA Connect State E-rate Coordinator listserv and the COSLA Stacks online community of practice; these reports will be used to determine goals for sustainability.

Sustainability

For the purposes of this project, sustainability will be defined as 1.) identifying a plan for continued gathering of state library E-rate coordinators and 2.) identifying a plan for continued information sharing among state library E-rate coordinators. Both of these plans will need to address the current scarcity of funding and time.

Keeping both of these constraints in mind, current plans for sustainability are structured around the continued enhancement of the COSLA Stacks COP and transitioning the state coordinator training events to a COSLA Forum format. The COSLA Stacks will be a repository for shared documents, such as best practices for onboarding new state coordinators, sample training modules for library staff, and other exemplar materials.

The COSLA Forum is based on support from state agencies in three ways: rotating duties as a host site, volunteering staff time to coordinate the program, and paying for participant travel. This format has been successful for state library continuing education coordinators and youth service coordinators. This grant will provide the resources needed to prove the concept to state library agencies for continued, sustainable support.

Diversity Plan:

State E-rate coordinators for libraries work toward increasing equity, diversity, and inclusion by advancing digital access and connectivity across their states. This proposed training will further enable effective deployment of this vital funding program by equipping state coordinators with knowledge, experience, and a network of support. It will address the inequalities among state library agencies by supporting state coordinator attendance with travel stipends in states where there may not be sufficient budget for professional development. Finally, this proposal will empower state coordinators to grasp the unique opportunity to build capacity for many first-time tribal applicants in alignment with recent changes to the E-rate rules for tribal and small libraries.

In a recent review of the E-rate program³⁵ an Idaho library remarked, “E-rate is a lifesaver for our tiny, rural library. We would not be able to afford equivalent internet services without it.” A Pennsylvania library added, “In addition to using ethernet for public access computers within the library, the E-rate program allows the Library System to provide free wifi 24 hours each day inside and extended to outside the buildings. Residents often sit outside the libraries to use the wifi when the libraries are not open to the public.” Still another library stated, “Our library serves two rural counties and provides library service to almost 30,000 residents. The availability of high speed internet connectivity across the service area is varied and in places difficult to obtain at any cost. Without the support of the federal E-rate program we would not be able to provide the critical computer and internet services that our patrons at times desperately need.” These are just a few of the thousands of libraries that have been able to improve digital access to their communities because of E-rate.

³⁵ <https://www.fundsforlearning.com/e-rate-data/trendsreport>

However, in a current study of the E-rate program utilization by noted researchers Chris Jowaisis³⁶ and Bree Norlander³⁷ of the University of Washington iSchool, fourteen states have consistently underutilized E-rate funds for broadband connectivity for their libraries.³⁸ These states have had utilization rates of less than 50% for four or more years in the period of 2016 to 2022 for the funds specifically available for internet access and data transmission services.

Jowaisis listed several possible reasons for this disparity, including concerns about internet filtering requirements and the complexities of the E-rate process. These are both training issues, which can most effectively be addressed from the state level down. System disparities were also cited, including differences in statewide technology networks. For those states lacking in statewide technology infrastructure, he suggested that statewide consortia contracts could be a way to equalize opportunities- another training issue specific to state coordinators. A training for state coordinators for libraries will address these disparities and provide a network for ongoing support as each state coordinator works within their ecosystem to promote use of E-rate funds among their libraries.

Notably, our proposed training comes in the wake of recent changes to tribal libraries' access to the E-rate program, including an expanded definition of tribal libraries.³⁹ This comes as a result of years of advocacy from ALA⁴⁰ for greater access for tribal libraries.⁴¹ The first year of these changes includes special assistance from USAC, the administrative organization for the E-rate program. However, support in subsequent years will surely fall to state coordinators, given the trajectory of other pilot programs in the past. It is imperative to the long-term success of this diversity initiative that state coordinators plan now to provide that support.

Project Results and Impact:

This implementation grant would provide a first step toward making state E-rate coordinators for libraries more effective in their positions. The outputs will include the training events, digital products, and pre- and post-event assessment data from participants. The outcomes of the grant will be an increased confidence expressed by participants in their roles, as measured by pre- and post- event assessments, and a more robust community of practice, as measured by interactions on the ALA State Coordinator listserv and COSLA Stacks online COP space. The impact will be longer-term, as the results of this initial event will be used to develop a path forward for professional development, and the increased effectiveness of state coordinator staff will enable state libraries to become more compelling partners in a variety of digital equity and inclusion opportunities.

Deliverable 1: Training Events

Training events will focus on the unique role held by state E-rate coordinators for libraries. Nearly all state coordinators provide advice to their libraries, while many directly provide training and walk participants through the application process. Still others manage third-party consultants who do this work. All of them require not only a basic understanding of the program, which may be available through other avenues, but also an understanding of their specific opportunities in the context of the program. Even more critically, they need to understand the program from a bird's eye, administrative perspective in order to increase participation among their libraries and give them the greatest opportunity to build on the backbone of broadband access that E-rate can provide.

³⁶ <https://ischool.uw.edu/people/faculty/profile/chrisjow>

³⁷ <https://tascha.uw.edu/people/bree-norlander>

³⁸ https://github.com/tascha/E-Rate/blob/main/Data/Commitment_Percentages_by_State.csv

³⁹ <https://www.usac.org/e-rate/learn/tribal-training/tribal-libraries-pilot-program>

⁴⁰ https://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/telecom/erate/Built_by_E-Rate_WEB_090420.pdf

⁴¹ <https://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/telecom/TribalBroadband.pdf>

Deliverable 2: Training materials

As valuable as the training events will be, the digital copies of training materials that are developed as part of those events will have a significant and lasting impact as well. These will include the handouts and other training event materials, as well as materials developed by the state coordinators during the period of the project and shared on the ALA State Coordinator listserv and COSLA Stacks. These resources will be curated and stored in the COSLA Stacks for future reference. The Digital Products Plan has additional information about this output.

Deliverable 3: Pre- and Post- Assessment Data

The pre- and post-event assessments will be constructed as a collaboration among COSLA, the ERTF and the Training Consultants. The primary focus of the assessments will be to gauge the knowledge and skills of the state coordinators before the first event, after the first event, before the second event, and after the second event.

Pre-event assessment questions may include specific questions about:

- Years of experience
- Frequently performed tasks
- Confidence in various tasks.

Post-event questions may include Lickert scale statements like:

- I learned something by participating in this training.
- I am confident about using what I have learned.
- I am likely to apply what I have learned.

The secondary focus of the assessments will be to guide future professional development for state coordinators, likely including open-ended questions.

Deliverable 4: Enhanced Community of Practice

An enhanced Community of Practice will be measured by interactions on the ALA State Coordinator listserv and COSLA Stacks online COP space. The Project Director will create summary reports to describe the increase in interactions and the types of interactions that develop in these spaces after the first and second years of the project.

Deliverable 5: Established Proof of Concept

As described earlier in this proposal, there is currently no dedicated training available for state coordinators for libraries in their unique role. The purpose of this project is not to assess blame for that fact, but to find a sustainable path forward. There is currently a viable model in the COSLA Forums for continuing education, and there is a great willingness among ERTF members to share expertise, but there is a simple lack of capacity to jump-start the process. This project represents a large commitment, but it also represents a large pay-off. If we can work together to give greater resources to state library E-rate coordinators, they will be able to work together more effectively to provide better opportunities to all libraries to get their share of the \$4.45 billion dollars in E-rate funds available.

That is why one of the IMLS Peer Reviewers called the preliminary proposal “a textbook case of a reasonable amount of money having a potentially large multiplier effect in the sphere of public libraries nationwide.”

Schedule of Completion

Task	Start	End
Pre-planning activities to be done per Phase 1 description	prior to notification	
Project Director will schedule Project Team meetings through September	on notification	
Project Director will convene project launch meeting with all Project Team members	8/1/24	8/7/24
Grant Administrator & Project Director will finalize & execute contract for Training Consultants	8/7/24	8/30/24
Grant Administrator & Project Director will finalize & execute 2024 event venue contract	8/7/24	8/30/24
Training Consultants & Project Director will finalize & execute audience outreach for 2024 event - Outreach will include pre-event assessment for curriculum topic prioritization	8/30/24	9/16/24
Grant Administrator & Project Director will review project budget and expenditures	8/30/24	9/16/24
Grant Administrator & Project Director will finalize & launch 2024 event registration site	8/30/24	9/16/24
Grant Administrator & Project Director will finalize & launch travel stipend application	8/30/24	9/16/24
Project Director will schedule Project Team meetings through December	8/30/24	9/16/24
Training Consultants will finalize curriculum outline with Project Advisory Committee	9/16/24	9/30/24
Training Consultants will develop curriculum content	10/1/24	11/1/24
Project Team will develop the post-event assessment - Content will include questions regarding performance measures	10/1/24	11/1/24
Travel stipends will be distributed by Grant Administrator and COSLA Staff	10/1/24	12/30/24
Fall 2024 in-person event will convene	Early November 2024	
Project Director will distribute the quarterly post-event assessment	Late November 2024	
Grant Administrator & Project Director will review project budget and expenditures	12/2/24	12/20/24
Project Director will schedule Project Team meetings through June	12/2/24	12/20/24
Project Director will create & distribute the semi-annual summary report of ALA Connect & COSLA Stacks activity for the Project Team (hereafter “the summary activity report”)	12/2/24	12/20/24
Project Team will analyze the quarterly post-event assessment data & the summary activity report	1/2/25	1/31/25
Project Team will begin planning for the 2025 event	1/2/25	1/31/25
Grant Administrator & Project Director will review project budget and expenditures	3/3/25	3/31/25
Project Director will distribute the quarterly post-event assessment	3/3/25	3/31/25
Project Team will analyze the quarterly post-event assessment data	4/1/25	4/30/25
Grant Administrator & Project Director will finalize & execute 2025 event venue contract	5/1/25	5/16/25
Grant Administrator & Project Director will finalize & launch 2025 event registration site	5/19/25	5/30/25
Training Consultants will finalize curriculum updates with Project Advisory Committee	6/2/25	6/30/25

Task	Start	End
Grant Administrator & Project Director will review project budget and expenditures	6/2/25	6/30/25
Project Director will schedule Project Team meetings through December	6/2/25	6/30/25
Project Director will distribute the quarterly post-event assessment	6/2/25	6/30/25
Project Director will create the summary activity report	6/2/25	6/30/25
Project Team will analyze the quarterly post-event assessment data & the summary activity report	prior to event	
Summer 2025 in-person event will convene	Late Summer 2025	
Project Director will distribute the quarterly post-event assessment	shortly after event	
Grant Administrator & Project Director will review project budget and expenditures	9/2/25	9/30/25
Project Team will analyze the quarterly post-event assessment data	10/1/25	10/31/25
Project Team will use data from the previous year to plan for sustainability	10/1/25	10/31/25
Grant Administrator & Project Director will review project budget and expenditures	12/1/25	12/19/25
Project Director will schedule Project Team meetings through June	12/1/25	12/19/25
Project Director will distribute the quarterly post-event assessment	12/1/25	12/19/25
Project Director will create the summary activity report	12/1/25	12/31/25
Project Team will analyze the quarterly post-event assessment data & the summary activity report	1/5/26	1/30/26
Project Team begin transition to plan for sustainability	1/5/26	1/30/26
Grant Administrator & Project Director will review project budget and expenditures	3/2/25	3/31/25
Project Director will distribute the quarterly post-event assessment	3/2/25	3/31/25
Project Team will analyze the quarterly post-event assessment data	4/1/26	4/30/26
Grant Administrator & Project Director will review project budget and expenditures	6/1/26	6/30/26
Project Director will schedule Project Team meetings through June	6/1/26	6/30/26
Project Director will distribute the quarterly post-event assessment	6/1/26	6/30/26
Project Director will create the summary activity report	6/1/26	6/30/26
Project Team will analyze the quarterly post-event assessment data & the summary activity report	7/1/26	7/31/26
Project Team will start to execute plan for sustainability	7/1/26	7/31/26
Grant Administrator & Project Director will close out the grant project	7/1/26	7/31/26

The Project Director will provide monthly email reports to the Grant Administrator regarding the status of activities listed on the Schedule of Completion.

The Project Director will meet with the Training Consultants regarding the status of deliverables on a schedule mutually agreed by contract.

Digital Products Plan

Type

Through the six phases of this project, a series of five types of digital products will be developed:

Project Information

The Project Team will communicate with state E-rate coordinators through existing channels: the ALA State E-rate Coordinators Discussion Group on the ALA Connect online membership platform¹ and the COSLA State E-rate Coordinators Community of Practice on the COSLA Stacks online membership platform.² Both of these online discussion areas require permissioned accounts, as general discussions on these platforms can and do involve sensitive information at times. This digital product will have a lifespan that starts before and extends beyond the period of the grant.

Event Registration Information

As the fiscal and administrative agent for the project, COSLA will host event information on their website, including registration, the training agenda, and travel details. Travel stipend administration will take place through the COSLA website as well. Two versions of this digital product will be created, one for each event during the grant period.

Event Handouts

Following the multi-day, onsite training events, the Training Consultants (EdTech Strategies) will provide PDF copies of its presentations to library state E-rate coordinators. The Project Director will post these to the COSLA Stacks, to ensure that the intellectual property of the presenters is available specifically to the intended audience. Terms of the rights to the handouts will be spelled out in the contract with EdTech Strategies. Two sets of this digital product will be created, one for each event during the grant period.

Survey Data

Some survey data has been collected in the planning phase of this project, and it is likely that additional survey data will be required in the refinement of the event design. The Project Director will also develop post-event assessments as described in the grant narrative. Google Forms has been utilized for surveys of the state coordinators to this point, and the Project Team intends to use Google Forms for future surveys as well.

Summary Reports

The Project Director will create semi-annual summary reports of activities on the ALA State E-rate Coordinators Discussion Group on the ALA Connect online platform and the COSLA State E-rate Coordinators Community of Practice. These reports will be created as Google Docs and shared with the Project Team via email. They are intended to be ephemeral glimpses into the development of these online communities and a source of insight for future content development and sustainability considerations. Besides being ephemeral, the reports will not be

¹

<https://connect.ala.org/communities/community-home?CommunityKey=060bf759-f545-48bf-aa0e-192853058721>

² <https://cosla.memberclicks.net/member-landing-page>

public documents, and thus will not be addressed in terms of availability, access, or sustainability in the remainder of this plan.

Availability

As noted briefly in enumeration of the product types, these resources will have a limited availability to the specific audience of state E-rate coordinators. The reasons for this are three-fold. First and foremost, the purpose of the project is to speak to the very specific training and development needs for state E-rate coordinators for libraries. The products developed have a narrow, but very important audience. Second, some of the resources, in particular, survey data or online discussions, may touch upon sensitive topics that are not appropriate to a wider audience for a variety of reasons. Third, as mentioned in the grant narrative, E-rate consulting is a very large, very lucrative business. Unfortunately, the experience of the Project Team members—Advisory Team as well as Training Consultants—has shown that some consultants do not always act with professional integrity. The intellectual property of the Training Consultants and state coordinator community alike needs a layer of protection from those who would use that property for personal benefit.

Access

The Project Team will work with the IMLS Program Officer to ensure that the contract with EdTech Strategies meets the requirements of intellectual property for Federal Government purposes, but, to the largest degree possible, access to the Event Handouts will be limited to the state E-rate Coordinator audience as described above. Survey data may include personally identifiable information, but that information will only be available to the Grant Administrator and Program Director in its entirety and the Advisory Team as necessary and explained on the survey. Publication of the data on ALA Connect, COSLA Stacks, or any other platform will be aggregated and/or anonymized. Detailed event registration data will be made available to COSLA staff, the Grant Administrator, and the Program Director, and other registration data (i.e. name, title, state affiliation, e-mail) will only be shared with permission by the registrant.

Sustainability

The nature of information relating to a federal program is in some ways ephemeral: there is an ongoing cycle of rule changes that mean what was true yesterday may not be true in the future. Nonetheless, the Project Team expects that the nature of the platforms chosen for the digital products will match the expected lifetime of each product. Project information will remain searchable on the ALA Connect and COSLA Stacks platforms during and past the duration of the project, with neither parent organization planning a large-scale migration in the near future. Likewise, Google Forms, the platform for planned surveys, is expected to be stable for the duration of the grant, and the pertinent, summarized information will remain available on the COSLA Stacks past the duration of the grant. Event registration information is not expected to be maintained beyond a short period after each event, and the PDF format for event handouts is expected to enable participants to view the pertinent information for an appropriately long period after each event.