

**Office of Head Start  
E-Rate Technology Plan**

# **Reference Guide**

**Revised April, 2012**



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# 1. Overview: Head Start E-Rate Technology Plans

## 1.1 Scope

A technology plan is required for E-Rate applicants requesting discounts for Priority 2 services (internal connections and basic maintenance of internal connections). It is not required for Priority 1 services (telecommunications and Internet access). The FCC requires E-Rate applicants to base their requests on an approved technology plan. A Technology Plan Approver (TPA) certified by Universal Service Administrative Company (USAC) must approve the applicant's technology plan before the applicant may receive services.

Although Head Start grantees are not required to use this reference guide and accompanying template, these resources have been developed to meet the requirements outlined by the FCC and USAC.

This Reference Guide provides definitions, samples, issues to consider, tables, and other tools to assist in creating and documenting the agency's plans. The template covers the four elements required by USAC that must be included in a technology plan in order to gain approval: :

- Goals and realistic strategies for using telecommunications and information technology to improve education or library services
- A professional development strategy
- Needs assessment for telecommunication, hardware, software, and other services
- Ongoing evaluation process.

Most agencies have already developed components that can become part of the E-Rate Technology Plan, such as agency profile and mission and vision statements. Furthermore, goal setting, development of strategies, ongoing assessment, and budgeting are typical processes for Head Start programs.

Collecting and organizing information for a technology plan will help the applicant complete the E-Rate Form 470, *Description of Services Requested and Certification* and Form 471 *Service Ordered and Certification*. The technology plan should be the basis for Priority 2 services on Form 470. Documenting an educational purpose or need for services will help applicants complete the "Summary Description of Needs or Services Requested" in Block 2 of Form 470. The approved plan should be consistent with the "Technology Resources" in Block 3 and should support the "Certifications" in Block 5 of Form 470. The approved plan should be consistent with similar information blocks in Form 471 and should support the "Certifications" in Forms 471 and 486 *Receipt of Service Confirmation Form*. These forms can be found on the USAC web site at <http://www.usac.org/sl>.

## 1.2 Sequence: the planning cycle

The Office of Head Start recommends that plans align with the E-Rate Fiscal Years that start each year on July 1 and end on June 30 of the following year. The Federal Communications Commission (FCC) requires that Technology Plans should be written prior to filing Form 470 and includes the period for which E-Rate discounts are requested. The period covered may not exceed 3 years from the date of approval.

Technology Plans **MUST** be developed by all Head Start grantees applying for E-Rate beyond basic

telephone service and Internet access, as described in the current E-Rate Eligible Services List. Basic telephone service is defined as landline or wireless single-line voice service, e.g., local, cellular, and/or long distance, as well as mandatory fees associated with such service, e.g., federal and state taxes, universal service fees, etc.

The Technology Plan expiration date will be listed on the certification letter the grantee will receive from the TPA and will be less than 3 years from the date of approval. For example: a three-year plan signed after November 15, 2006 and approved prior to July 1, 2007 will expire on or before November 15, 2009. Technology Plans must be reviewed annually (refer to Core Elements III and IV). Plans should be modified as needed but if substantial changes are made, the plan must be resubmitted for approval as changes in goals or changes that make previously eligible equipment ineligible for E-Rate.

**Important note:** Direct participation by potential service providers in developing detailed plans should be avoided, as it could prohibit considering the vendor participation during the E-Rate bidding process. Service providers should not assist grantees with completing Form 470. Applicants are encouraged to ask service providers to assist in the completion of Form 471 and item 21 attachments. Service providers may NOT provide in-kind services and equipment.

## 2. Cover Page and Table of Contents

### 2.1 Cover page

*Description:* the cover page should contain all the information identifying the agency, the main office address and telephone number, the title of the submission, the names and functions of three top executives as well as their phone numbers and email addresses. It also should include a signatory line for the authorized executive to sign and date.

<p><b>Head Start - Best Early Childhood Ever, Inc.</b></p> <p><b>Administrative office address</b> <b>City, State and Zip</b> <b>Main phone number</b></p> <p><b>Technology Plan</b></p> <p><b>2007 – 2010</b></p> <p>Approved: <u><i>Robert G. Smith, 11/01/06</i></u></p> <p>Authorized signature and date of signature</p> <p><b>D. J. Berbe, Executive Director</b> Phone: (123) 123-1234 ~ Email: <a href="mailto:djberbe@hsbece.org">djberbe@hsbece.org</a></p> <p><b>Robert G. Smith, Ph.D., Head Start Director</b> Phone: (123) 123-1234 ext 111 ~ Email: <a href="mailto:rgsmith@hsbece.org">rgsmith@hsbece.org</a></p> <p><b>Zeke S. Good, MIS Director</b> Phone: (123) 123-1234 ext 121 ~ Email: <a href="mailto:zsgood@hsbece.org">zsgood@hsbece.org</a></p>
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Table1. Sample cover page

## 2.2 Table of contents

*Description:* The Table of Content reflects the organization of the plan and also constitutes the framework for the Approver to seek and find the information submitted in support of the application – see Approver’s checklist.

<ul style="list-style-type: none"><li><b>1. Core Element I: Agency Profile, Goals and Strategies</b><ul style="list-style-type: none"><li>A. Agency Profile</li><li>B. E-Rate Technology Plan Summary</li><li>C. Agency Mission and Vision Statements</li><li>D. Technology Planning Committee</li><li>E. Goals and Strategies</li></ul></li><li><b>2. Core Element II: Professional Development</b></li><li><b>3. Core Element III: Assessment</b><ul style="list-style-type: none"><li>A. Assessment of Services and Equipment</li><li>B. E-Rate Discounted Services</li><li>C. Needs and Planned Acquisitions</li></ul></li><li><b>4. Core Element V: Evaluation and Monitoring</b></li><li><b>5. Children’s Internet Protection Act (CIPA): Compliance and Policy</b></li><li><b>6. Technology Plan Certification Page</b></li></ul>	
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Table 2. Sample table of contents

### 3. Core Element I: Agency Profile, Goals, and Strategies

#### 3.1 Agency profile

*Description:* The agency profile should include basic information pertinent to the applicant’s technology plan. The profile should provide a suitable context and sufficient information for the Technology Plan Approver to assess the soundness of the submitted plan.

*Questions to consider:*

1. What is the enrollment size of the applicant’s Head Start program?
2. Where is the program located?
3. What geographic area does the program serve?
4. Have there been significant changes in the demographics of your geographic area within the last three years? If so, describe these changes.
5. What are the challenges and the impact of these changes?

<ol style="list-style-type: none"> <li>1. Head Start - Best Early Childhood Ever, Inc.</li> <li>2. Street address: 1324 River Rd</li> <li>3. City State Zip: Canton, CA 99999</li> <li>4. Phone: (123) 123-1234</li> <li>5. Fax: (123) 123-1001</li> <li>6. <a href="http://www.hsbece.org">www.hsbece.org</a></li> <li>7. E-Rate Application Type: <u>School District</u></li> <li>8. FCC Registration Number: <u>0123456789</u></li> </ol>	<ol style="list-style-type: none"> <li>9. Billed Entity Number(s): <u>12345677</u></li> <li>10. Head Start Grant Number: <u>09CH1234-000</u></li> <li>11. Total Funded Enrollment: <u>1300</u> Center base: <u>1200</u> Home base: <u>60</u> Other: <u>140</u></li> <li>12. Number of Centers: <u>7</u> Number of Classrooms: <u>60</u> Number of children eligible for NSLP <u>1200</u></li> </ol>
<p>Head Start - Best Early Childhood Ever, Inc., is a private, non-profit 501(c)(3), community-based organization that promotes early childhood education by delivering a comprehensive high quality school readiness curriculum to support the educational, nutritional, health, social, and emotional needs of low-income children, ages birth to five, and their families.</p>	

Table 3. Sample agency profile

Center Name	Entity Number	Address	Phone	Fax
Fitzgerald 10 Classrooms	12345678	1324 River Rd. Canton, CA	(123)123-1234	(123)123-2234
Vaughan 20 Classrooms	12345679	5343 Liver Rd. Canton, CA	(123)123-1235	(123)123-3234
Bailey 2 Classrooms	12345680	9090 Tupau Rd Canton, CA	(123)123-1236	(123)123-4234
Garland 6 Classrooms	12345681	7686 Celle Rd. Canton, CA	(123)123-1237	(123)123-5234
Davis 2 Classrooms	12345682	1234 Holly Rd. Canton, CA	(123)123-1238	(123)123-6234
Crawford 20 Classrooms	12345683	8643 George Rd Canton, CA	(123)123-1239	(123)123-7234

Table 4. Sample agency profile – continued:  
List of educational facilities/centers addressed by this plan.

NAME	ENTITY NUMBER	ADDRESS	PHONE	FAX
Administrative Office	12345677 <b>(BEN)</b>	1324 River Rd. Canton, CA	(123)123-1234	(123)123-1001
Education & Social Services Office	12345676	1325 River Rd. Canton, CA	(123)123-1234	(123)123-1004
Bus Motor Pool	12345700	1300 Lagud St. Canton, CA	(123)123-5555	(123)123-1002
Payroll & Finance Office	12345699	1323 River Rd. Canton, CA	(123) 123-1234	(123)123-1003
Human Resources Training Center	12345698	1326 River Rd., Canton, CA	(123) 123-1234	No FAX

Table 5. Sample agency profile – continued:  
List of all administrative and non-instructional facilities addressed by this plan.

### 3.2 E-Rate technology plan summary

*Description:* The E-Rate technology plan summary describes the key elements of the technology plan and the goals.

The technology plan for Head Start Best Early Childhood Ever, Inc.'s E-rate application identifies two key projects designed to increase the use of timely and accurate data on Head Start children and their families. The Family Information System (FIS) project will enable teachers, family caseworkers and management staff to monitor all aspects of enrollment and family services. The Child Outcomes Project will give teachers, the Child Development Manager and other education staff access to a comprehensive set of data and reports on each child's educational and developmental progress. The plan details the two projects' system installation, pilot testing, staff training, procedural development, monitoring methods and budget that will initiate and sustain the systems.

Table 6. Sample E-Rate technology plan summary.

### 3.3 Agency vision and mission statements

#### **Vision statement:**

*Description:* A vision statement expresses what an agency strives to be and how others view it. It defines where the organization wants to be in the future and projects the optimistic view of the organization's future. More information on vision statements in Head Start is available in [Participating in the Management Process](#), a Training Guide for the Head Start Learning Community. The Training Guide can be found on the Early Childhood Learning and Knowledge Center (ECLKC) at <http://eclkc.ohs.acf.hhs.gov>.

The Head Start – Best Early Childhood Ever, Inc. agency strives to become known as the community "wellness agency" through the creation and delivery of services designed to enhance wellness across all dimensions for people of all ages.

Table 7. Sample vision statement.

#### **Mission or purpose statement:**

*Description:* A mission statement is a brief, general description of the organization's plans for achieving the vision. An organization's mission statement describes what the organization is going to do, and explains why.

The mission of Head Start – Best Early Childhood Ever, Inc. is to provide quality early childhood learning experiences and comprehensive child and family services, which empower low-income families and their children to maximize their success.

Table 8. Sample mission statement.

### 3.4 Technology Planning Committee

*Description:* Development of the technology plan and implementation of the plan should enable parents, teachers, and staff as well as the local community to benefit from the investment in technology. A Technology Planning Committee guides the development and implementation of the plan. All stakeholders should have representation on the committee. The governing body and policy council must approve the plan.

<b>Technology Committee</b>		
<b>Member's name</b>	<b>Title</b>	<b>Constituency represented</b>
Smith, Robert G.	Head Start Director	HSBECE Management
Wesson, Clifford	Parent	HSBECE Policy Council
Good, Zeke	MIS Director	HSBECE IT Staff
Samoto, Alice	Teacher	HSBECE Staff
Walton, Samantha	Volunteer	Community

Table 9. Sample Technology Planning Committee.

### **3.5 Goals and strategies**

*Description:* The plan must establish clear goals and a realistic strategy for using telecommunications and information technology to improve education services. List and describe the specific goals, objectives, and strategies for use of technology. The goals, objectives, and strategies should be based on the results of the technology needs assessment. Realistic goals should be established for the next three years.

Sample technology projects in Head Start include:

- Technology as a tool for parental involvement and communication
- Technology integration with curriculum and instruction
- Technology for delivery of media, such as flash drives, satellite television, videoconferencing
- Technology for administrative support
- Increase/improve technology access for teachers, parents and children
- Technology as a tool for delivery of staff development

*Issues to Consider:*

1. What goals have been identified that improve a child's ability to learn, enrich the educational experience of children, increase the effectiveness of teachers and parents, or enhance the Head Start program's overall performance?
2. What accompanying strategies have been identified to reach these goals?
3. What specific telecommunications and information technologies – such as access to the Internet, remote databases, distance learning, etc. – are useful in helping the agency reach its goals?
4. What specific resources, e.g., trainers, curricular software, Internet access, links to subscribed databases, etc., will be used?
5. What are the technology strategies to help ensure compliance with the Head Start Program Performance Standards and other regulations?
6. Will the agency provide parents or staff with access to courses delivered online or through interactive television or other distance learning technologies? What groups do these programs serve?

7. Will the agency provide materials in various formats and languages, including digital format, video?
8. Are there plans to implement an innovative initiative with laptops or handheld devices?
9. Will the teachers and administrators use technology for decision making or communicating?
10. Are computerized or on-line assessments used?
11. How will the Head Start program use technology effectively to promote parent involvement and increase communication with parents?

Goal: Teachers, administrative staff, and parents will have access to accurate and timely student data					
Objectives: Bring online service delivery tracking program.					
Activities	Person Responsible	Timeframe	Resources	Funding	
Purchase service delivery tracking software	MIS Director	By Aug 15, 2008	PA 22	\$8,750.00	
Install service delivery tracking program at all sites and administration site	MIS Director	By Sep 1, 2008	PA 22	\$ 500.00	
Budget Total				\$9,250.00	

Table 10. Sample goals, objectives and activities.

## 4. Core Element II: Professional Development

*Description:* The plan must include professional development strategies to ensure that staff members know how to use new technologies to improve education. Describe professional development related to achieving the goals and objectives:

- Provide a statement describing how enhancing the capabilities of the Head Start teachers, staff, and administrators to utilize technology are vital to reaching goals.
- Describe planned training opportunities to foster the appropriate skills so that existing and emerging Information Technologies and telecommunications resources will be fully incorporated and achieve high returns on the investment in technology.

*Issues to Consider:*

1. How will the staff member's technology skills be evaluated?
2. How will the staff be trained?
3. Are TA funds used to train staff in technology?
4. Is skill progression tracked and progress reported in staff members' individual career plans?
5. Are there guidelines and incentives for staff participation in training?
6. What are the methods of ongoing internal monitoring of staff skill progression?
7. Are there mentoring, coaching, or train-the-trainer programs for educating staff, volunteers and parents on equipment and services?
8. Are instructional resources provided, such as reference manuals and publications, so staff may improve their technical proficiencies at their own pace?
9. Do technology staff members pursue outside training for professional certifications?
10. How do technology staff members stay current on new or emerging technology?
11. Do technology staff members participate in conferences to learn about best practices?
12. How are staff members trained on computer-based data collection, such as PIR, child assessments, and attendance?
13. Are staff members encouraged to use e-mail correspondence?
14. Are staff members using the Internet to research answers to questions?
15. How are parents informed of Head Start policies on appropriate use of technology?

Goal: Teachers will use service delivery tracking software to document student progress and access records.					
Objectives: Teachers will gain skills to use service delivery tracking software.					
Training & Professional Development Activities	Person Responsible	Timeframe	Resources	Funding	
Contract with service provider to deliver no less than 2 hours of training to teachers during quarterly training meetings on service delivery tracking software	Education Manager	Contract by Aug 15, 2008; Begin training Sept 2008	service delivery tracking software provider	PA 20 \$3,000.00	
<b>Budget Total</b>					

Table 11. Sample professional development goals, objectives, and activities.

## 5. Core Element III: Assessment

The plan must include an assessment of the telecommunication services, staff skills, hardware, software, and other services needed to improve education services.

### 5.1 Assessment

*Description:* Assessment of Services and Equipment – Conducting an assessment involves identifying the technology needs of the entire organization and its stakeholders. If available, use the previous technology plan to evaluate progress. When assessing services and equipment, use terminology found in the [E-Rate Eligible Services List](#). Information Technology staff, current service providers, and vendors can provide assistance comparing current systems with new technology. Surveys and ongoing reports from Information Technology staff should be considered during the assessment. It may be necessary to conduct a telecommunications audit using outside resources, such as vendors and consultants.

*Issues to Consider:*

1. How was the needs assessment conducted (e.g., staff questionnaires, focus groups, etc.)?
2. Who participated in the needs assessment?
3. What were some of the critical components of the needs assessment?
4. What were some of the key results of the needs assessment?
5. What are your agency’s current staff knowledge and skills as they pertain to this project?
6. Computers and network devices - provide a table with an inventory of equipment; include the life cycle of the equipment.
7. Telecommunications – list the number of lines and equipment by center or facility.
8. Internet access and services – identify the types of service, speed, and quality/reliability of service. Consider using staff and teacher evaluations and comments to develop new requirements.
9. Software Inventory – provide a list of all the software used by your organization. Identify operating systems, virus protection, firewall and anti-spam software. Include version numbers.
10. Emerging Technologies and other Technologies – list emerging technologies considered, such as television, satellite system, video conferencing devices, recruiting kiosks. Include the life cycle of the equipment.

Computers and Network Devices			
Equipment Description (name & size)	Number	End of Life Cycle	Notes
Vaughn Center Desktop Computer (Intel P4/3ghz, 120 hd)	1	December 2007	Electrical Upgrades needed in 10 classrooms
Vaughn Center Printer (Canon MF8170C)	1	December 2010	Also used as copier/fax
Vaughn Center Laptop Computer (Broken)	1	April 2002	Remove from Inventory

Table 12. Sample assessment table for E-Rate technology plan: computers and network devices

Telecommunication		
Center/Location	Equipment	Number of Lines
Vaughn Center	3 RCA Exec. Series phones 1 canon 8170 FAX	2 analogue

Table 13. Sample assessment table for E-Rate technology plan: telecommunication.

Internet Access				
Center/Location	Service	Speed	Reliability	Notes
Vaughn Center	ABC Internet	56K dialup	Excellent	Speed inadequate for software updates.

Table 14. Sample assessment table for E-Rate technology plan: Internet access.

Software			
Center/Location	Name/Description	Version	Number of licenses
Vaughn Center	MS Windows XP	2002 SP2	1

Table 15. Sample assessment table for E-Rate technology plan: software.

Emerging Technologies		
Description	End of Life Cycle	Notes
MS Windows Vista (Computer OS)	2014	Ultimate or Business edition required for networking.
XYZ Desktop Sharing Software (Webinar)	N/A	Used for help desk/training

Table 16. Sample assessment tables for E-Rate technology plan: emerging technologies.

## 5.2 E-Rate discounted services

*Description:* List existing services and equipment needed to accomplish the plan. Identify additional services needed to meet goals and objectives. List hardware and software you plan to purchase to support the goals and objectives. [The Eligibility Services List](#) on the USAC/SL web site is a useful reference to use when developing your list. Collecting and organizing this information to complete your lists will help you complete the E-Rate Forms 470 and 471. Organize requests using the four eligible categories of service:

1. **Telecommunications services:** The services used to communicate information electronically between sites. They must be provided by a telecommunications carrier, i.e., an organization recognized by the FCC as providing telecommunications services on a common carrier basis. Examples of telecommunications services include basic telephone service and digital transmission services such as T-1 lines.
2. **Internet access:** Basic conduit access to the Internet including e-mail is eligible for discount and can be provided by a telecommunications carrier or any commercial organization.

3. **Internal connections:** Internal connections consist of the wiring and components that expand data access within a Head Start center or classroom. Internal connections can be provided by any commercial organization
4. **Basic maintenance of internal connections:** Basic maintenance of internal connections consists of services necessary to enable the continued operation of the eligible equipment. It includes: repair and upkeep of eligible hardware, wire and cable maintenance, basic technical support, and configuration changes.

Finally, identify services provided that are not eligible for E-Rate discounts.

### 5.3 Schematics and diagram of the organization's network:

*Description:* Include a diagram that represents the elements of your computer network. Provide schematics of your current and planned system.

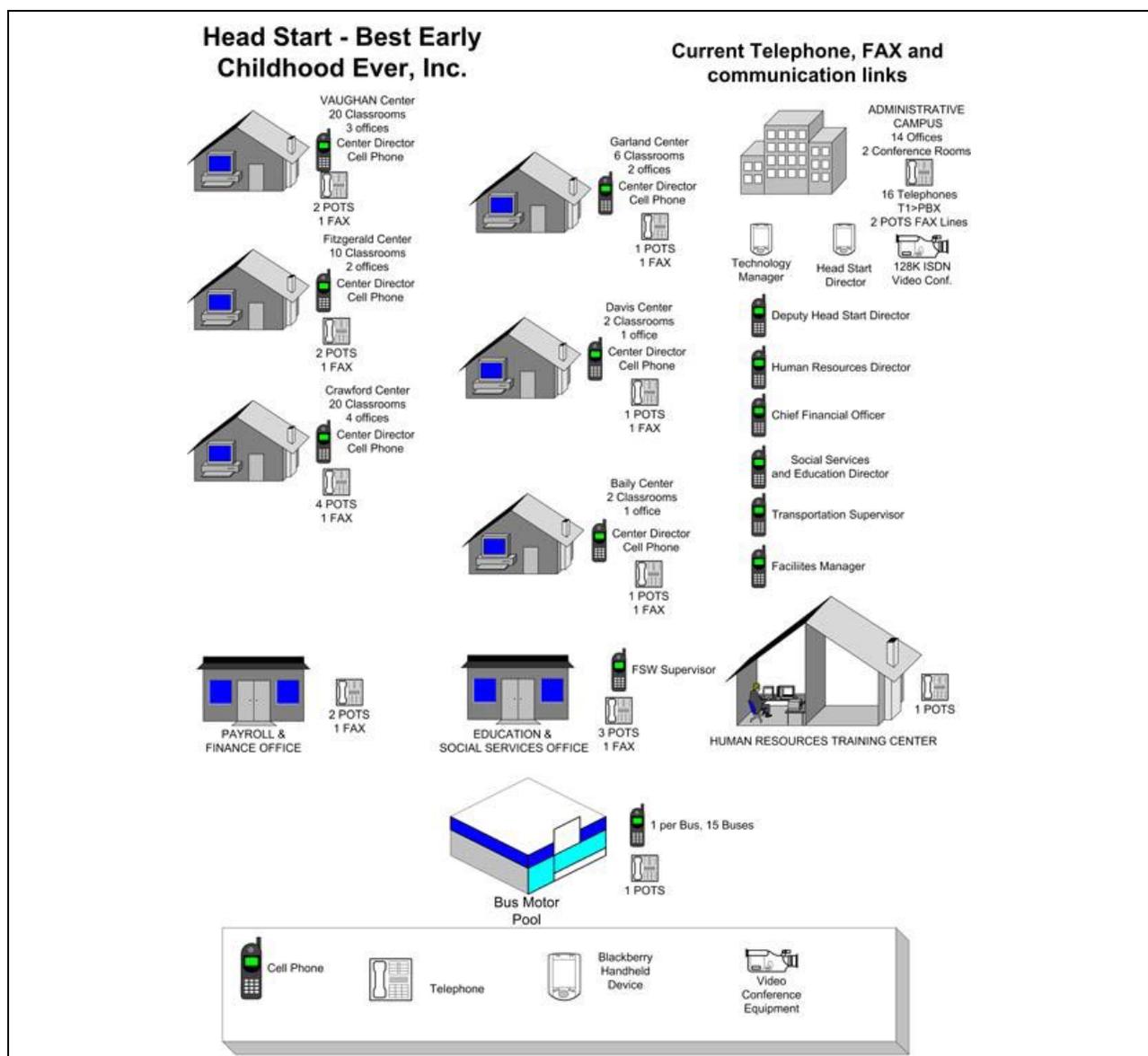


Figure 1. Sample current telephone, fax, and communication links.

# Head Start - Best Early Childhood Ever, Inc.

## Current Internet Connectivity Backbone

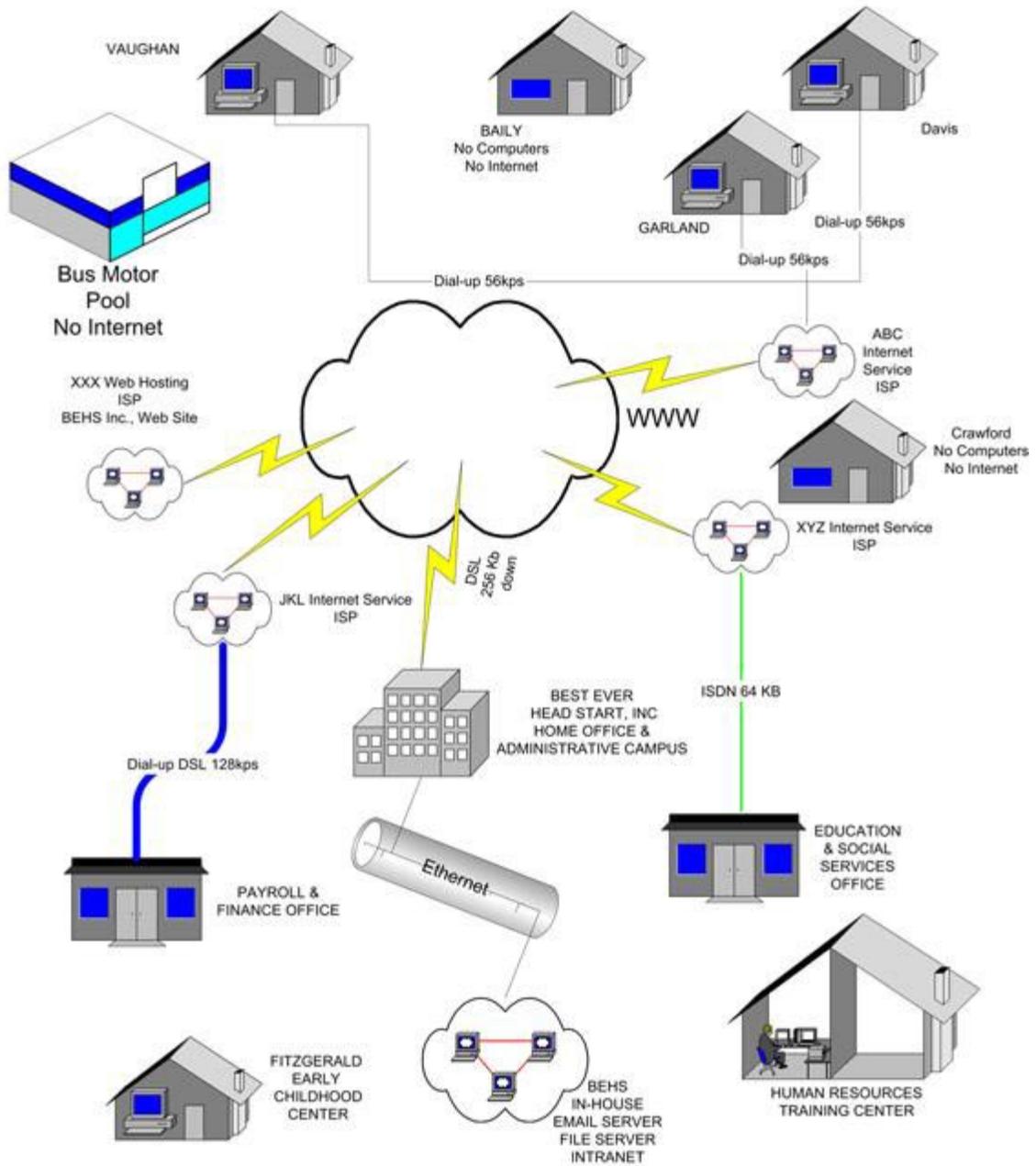


Figure 2. Sample current Internet connectivity backbone.

# Head Start - Best Early Childhood Ever, Inc.

## Planned Internet Backbone

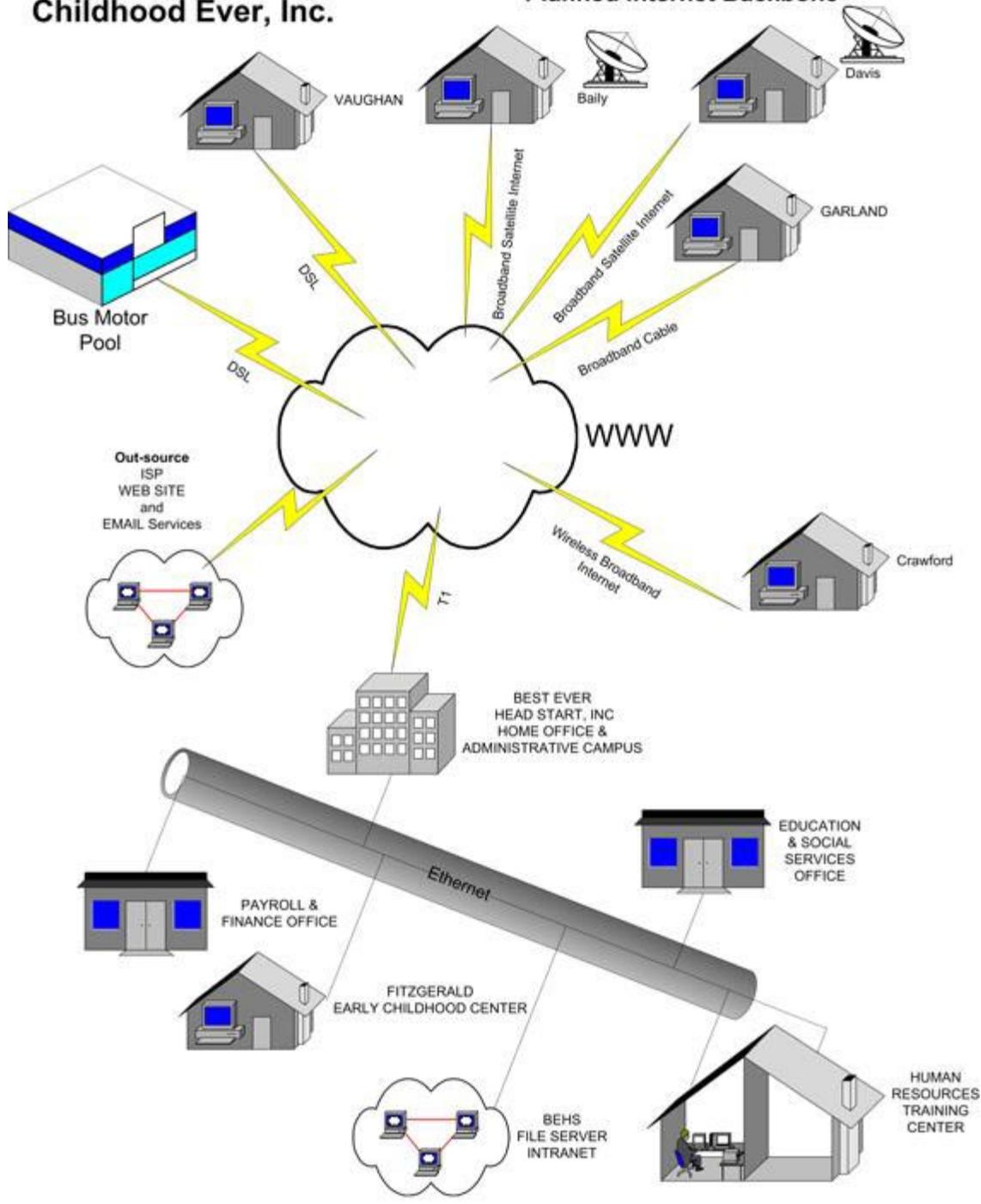


Figure 3. Sample planned connectivity backbone.

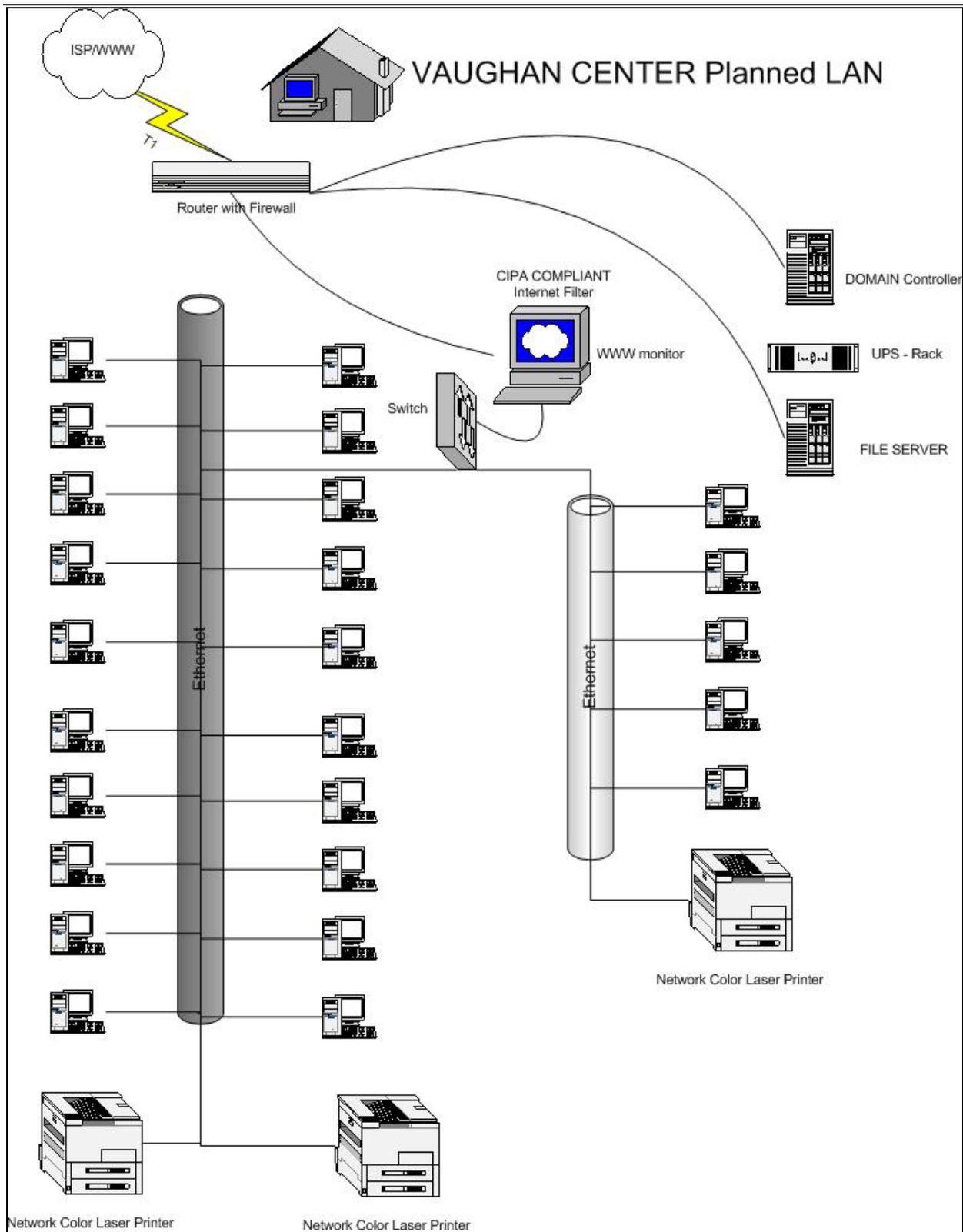


Figure 4. Sample center planned Local Area Network (LAN).

## 6. Core Element IV: Evaluation and Monitoring

*Description:* The plan must include an evaluation process that enables the Head Start program to both monitor progress toward the specified goals and make mid-course corrections in response to new developments and opportunities as they arise. The description of the process should include monthly and annual activities, such as e.g., periodic testing of equipment, staff surveys, staff skills assessments, child/parent interviews and/or classroom observation documentation, budget/report analysis. The process should address the following evaluation categories:

- Connectivity and infrastructure
- Hardware
- Integration and use of technology
- Professional development
- Fiscal support of technology

*Issues to Consider:*

1. What measures of performance have been incorporated into the plan to determine whether its implementation was effective in achieving your organization's objectives?
2. How often will the progress on your organization's plan be evaluated?
3. Who will conduct the evaluation?
4. Who will be responsible for documenting and analyzing the evaluation process?
5. What evidence exists that the previous technology plan was evaluated?
6. What will be done with the information gathered? The evaluation? How will it be used to improve the technology systems?

## **7. Children's Internet Protection Act (CIPA)**

*Description:* To receive support for Internet access and internal connections services from the Universal Service Fund (USF), the Head Start Grantee must certify that staff are enforcing a policy of Internet safety that includes measures to block or filter Internet access for both minors and adults to inappropriate content. In general, Head Start programs must certify either that:

- they have complied with the requirements of CIPA; or
- they are undertaking actions, including any necessary procurement procedures, to comply with the requirements of CIPA; or
- CIPA does not apply to them because they are receiving discounts for telecommunications services only.

CIPA requirements include the following three items: the Technology protection measure, Internet safety policy, and Public notice and hearing.

### **7.1 Technology protection measure**

A technology protection measure is a specific technology that blocks or filters Internet access. It must protect against access by adults and minors to visual depictions that are obscene, child pornography, or — with respect to use of computers with Internet access by minors — harmful to minors. It may be disabled for adults engaged in bona fide research or other lawful purposes. The policy must also include monitoring the online activities of minors.

### **7.2 Internet safety policy**

The Internet safety policy must address the following issues:

- Access by minors to inappropriate matter on the Internet and World Wide Web
- The safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications
- Unauthorized access including "hacking" and other unlawful activities by minors online
- Unauthorized disclosure, use, and dissemination of personal information regarding minors
- Measures designed to restrict minors' access to materials harmful to minors

### **7.3 Public notice and hearing**

The authority with responsibility for administration of the Head Start agency must provide reasonable public notice and hold at least one public hearing to address a proposed technology protection measure and Internet safety policy.

## **8. Technology Plan Document Certification Page**

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**Head Start agency authorized signatures and date approved.**

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**Head Start Policy Council approval**

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**Head Start Governing Board Approval**

## 9. Technology Plan Approver’s Checklist

*Description:* The Technology Plan Approver’s checklist reflects the types of information that must be included in the plan if it is to be approved.

Required Components	Page	Acceptable Yes / No	Notes
Does cover page contain contact information?			
Is the Table of Contents developed accurately?			
Does the agency profile contain key information about the organization and are all locations listed with entity numbers?			
Does the plan include information about members of the technology committee and their role in developing the plan?			
Are vision and mission statements included?			
Are strategies and timelines clear and do they include goals, objectives and activities?			
Is there a professional development strategy in place that includes a description of how staff will learn to use the technology in this plan?			
Does the plan include an assessment of the telecommunications services, infrastructure, staff professional development, fiscal support and facilities?			
Are schematics for current and planned systems clearly delineated?			
Does the projected budget cover 3 years?			
Does the plan describe the technology project’s monitoring and evaluation process?			
Is the Certification of Compliance with Children’s Internet Protection Act (CIPA) included?			
Does the Technology Plan Document Certification Page include the required signatures?			

Table 17. Approver’s checklist.