



Register online at [erwcon.com](http://erwcon.com)  
and see our expert lineup of speakers!

# A CONFERENCE EXPERIENCE LIKE NO OTHER.



## INTRODUCTION

Step into a world where technology, learning, and imagination come together! Our CSM E-Rate Conference at the Disney Resort invites attendees into an environment filled with creativity and possibility—where even complex funding rules feel a little more magical.

Attending the CSM E-Rate Conference means investing in your organization's technology future. You'll walk away with deeper knowledge, practical tools, and the confidence to secure and manage the funding needed to build reliable, future-ready networks. This is the one event designed to bring clarity, support, and inspiration to everyone involved in the E-Rate process.

## EVENT HIGHLIGHTS

- Built for Experts and E-Rate Beginners
- In-Depth and Informative Workshops
- See New Tools Available For Your E-Rate Workflow (**Platform available at no charge to clients!**)
- Exciting Conference Activities
- Networking With Peers & Industry Leaders
- Practical Tools and Resources to Secure & Manage E-Rate Funding Effectively

## INCLUDED WITH REGISTRATION

### Welcome Reception

*Disney's Grand Californian Hotel & Spa*

### Conference Group World of Color Viewing

*Disney's California Adventure Theme Park*

### Conference Luncheons & Breakfasts

*Disney's Grand Californian Hotel & Spa*



## WEDNESDAY OCTOBER 14, 2026

<b>3:00 PM - 5:00 PM</b>	Registration Opens
<b>6:00 PM - 8:00 PM</b>	Welcome Reception - Disney Grand California Hotel & Resort
<b>8:00 PM</b>	World of Color Showing - Disney's California Adventure

## THURSDAY OCTOBER 15, 2026

<b>7:00 AM - 8:45 AM</b>	Registration & Breakfast		
<b>9:00 AM - 9:45 AM</b>	General Session - Keynote Speaker Joseph Wender		
<b>10:00 AM - 10:45 AM</b>	From Install to Invoice C2 Projects	Introduction to ERW	From Utilization to Transformation: Leveraging E-Rate
<b>11:00 AM - 11:45 AM</b>	Strategic Planning & Compliance E-Rate Competitive Bidding	ERW RFP Resources	Intelesys: The Future is Cyber Secure
<b>12:00 PM - 1:15 PM</b>	Luncheon		
<b>1:30 PM - 2:15 PM</b>	Leading with Influence: Policy & Advocacy	ERW Document Management	Free Isn't Free: Understanding FCC Gift Rules
<b>2:30 PM - 3:15 PM</b>	From Utilization to Transformation: Leveraging E-Rate	ERW Asset Tracker	From Install to Invoice C2 Projects
<b>3:30 PM - 4:15 PM</b>	E-Rate Unplugged: Expert Panel Q&A	ERW Bid Evaluator	Intelesys: Articulating Artificial Intelligence

## FRIDAY OCTOBER 16, 2026

<b>8:00 AM - 9:00 AM</b>	Breakfast		
<b>9:15 AM - 10:00 AM</b>	E-Rate Invoicing & SAM.gov	ERW Reports & Category 2 Budget	TBA
<b>10:15 AM - 10:45 AM</b>	How to Be Awesome at Audits	ERW Asset Tracker	TBA
<b>11:15 AM - 12:00 PM</b>	Maximizing E-Rate Funding: Impact of CEP Data	ERW Bid Evaluator	TBA
	E-Rate Workshop	ERW Workshop	Tech Workshop

# WORKSHOPS

## E-RATE WORKSHOPS

### E-RATE INVOICING & SAM.GOV

Navigate the E-Rate invoicing process with clarity and confidence in this practical, step-by-step session. Participants will gain a clear understanding of the differences between BEAR and SPI invoicing methods, key submission deadlines, and common mistakes that can delay reimbursement. The session also covers SAM.gov registration and maintenance requirements to ensure accounts remain active and compliant. Attendees will leave with actionable strategies to streamline invoicing workflows, avoid costly errors, and ensure timely receipt of E-Rate funds.

### E-RATE UNPLUGGED: EXPERT PANEL Q&A

Join a panel of experienced E-Rate professionals for an interactive, participant-driven discussion focused entirely on your questions. This open forum provides clear explanations and practical guidance on real-world challenges, emerging issues, and common compliance concerns. Whether you are navigating complex applications, competitive bidding, invoicing, or audits, this session offers direct access to expert insight. Attendees are encouraged to bring questions, share experiences, and engage in meaningful dialogue that supports informed decision-making throughout the funding year.

### FREE ISN'T FREE: UNDERSTANDING FCC GIFT RULES & VENDOR COMPLIANCE

This session provides an overview of FCC gift rules and their impact on E-Rate compliance. Participants will learn how the gift rules intersect with open and fair competitive bidding requirements and review common violations involving meals, entertainment, promotional items, and free equipment or services. The class will also examine potential funding

consequences of noncompliance and highlight practical strategies to protect funding and maintain procurement integrity. Attendees will leave with clear guidance and best practices to support compliant decision-making across IT, purchasing, and service provider teams throughout the E-Rate cycle.

### FROM INSTALL TO INVOICE - CLOSING OUT YOUR C2 PROJECTS

Successfully closing out a Category Two project requires careful coordination and compliance from installation through final invoicing. This session provides a clear roadmap for managing completion deadlines, equipment documentation, asset tracking, and audit preparation. Participants will learn how to maintain accurate records, avoid common closeout errors, and meet documentation standards established by the Federal Communications Commission and administered by the Universal Service Administrative Company. Attendees will leave with practical tools and confidence to complete projects efficiently while protecting funding and ensuring smooth reimbursement.

### FROM UTILIZATION TO TRANSFORMATION: LEVERAGING E-RATE TO FUND DISTRICTWIDE INFRASTRUCTURE AT SCALE

Discover how strategic planning and strong program oversight can transform E-Rate from a funding opportunity into a districtwide infrastructure solution. This session highlights a real-world case study of a large district that successfully leveraged Category 2 and special construction funding to modernize internal networks and expand fiber connectivity. Presenters will share practical lessons on multi-year planning, competitive bidding for complex projects, compliance management, and large-scale implementation coordination. Attendees will gain

replicable strategies to maximize funding, strengthen governance, and drive long-term technology transformation.

### **HOW TO BE AWESOME AT AUDITS**

Audits are a routine part of the E-Rate program—but they don't have to be stressful. This session demystifies the audit process and provides practical strategies for staying prepared year-round. Participants will learn what commonly triggers audits, the types of documentation typically requested, and how to maintain organized, compliant records that withstand scrutiny. The presenters will also share proven best practices for minimizing findings and delays. Attendees will leave with greater confidence, stronger documentation habits, and a clear plan for remaining audit-ready at all times.

### **LEADING WITH INFLUENCE: POLICY AND ADVOCACY FOR E-RATE SUCCESS**

Effective advocacy plays a critical role in protecting and strengthening E-Rate funding at the local, state, and federal levels. This session explores how district leaders can engage policymakers, communicate program impact, and promote continued support for educational connectivity. Participants will learn strategies for building relationships with stakeholders, sharing compelling funding stories, and staying informed about legislative developments. Attendees will leave with practical guidance on how to serve as informed, confident advocates for their districts and the broader E-Rate community.

### **STRATEGIC PLANNING & COMPLIANCE IN THE E-RATE COMPETITIVE BIDDING PROCESS**

Build a structured, defensible, and compliant competitive bidding process with this comprehensive session designed for E-Rate coordinators and district leaders. Participants will learn how to conduct needs assessments, draft clear specifications, and align procurement

strategies with program rules established by the Federal Communications Commission and administered by the Universal Service Administrative Company. The session also covers developing weighted evaluation criteria, maintaining open competition, documenting award decisions, and managing vendor communication. Attendees will leave equipped to run transparent, audit-ready bidding cycles aligned with long-term district goals.

## **ERW WORKSHOPS**

### **ERW ASSET TRACKER**

Maintain accurate and compliant equipment records with the ErateWorks Asset Tracker. This session includes a live demonstration of the ERW Asset Tracking Tool and explains Category 2 equipment documentation requirements established by the Federal Communications Commission and administered by the Universal Service Administrative Company. Participants will learn best practices for documenting deployments, monitoring inventory across sites, and maintaining records that support audits and funding compliance. Attendees will leave equipped to implement organized, reliable asset tracking procedures within their districts.

### **ERW BID EVALUATOR**

Ensure fair, transparent, and compliant bid evaluations with this focused session on the ErateWorks Bid Evaluator. Participants will see a live demonstration of the tool and learn how it supports scoring documentation and alignment with procurement rules established by the Federal Communications Commission and administered by the Universal Service Administrative Company. The session reviews compliant evaluation criteria, documentation expectations, and audit considerations. Attendees will leave with a clear understanding of how to conduct consistent, defensible evaluations throughout the competitive bidding process.

## ERW DOCUMENT MANAGEMENT

Strong document management is the foundation of E-Rate compliance. In this session, participants will see a live demonstration of the ErateWorks® Document Management system and learn how it simplifies document collection, organization, and retention. The course reviews program documentation requirements and highlights best practices for maintaining audit-ready records throughout the funding cycle. Attendees will leave with a clearer understanding of how structured document management supports compliance, reduces risk, and promotes long-term program success.

## ERW REPORTS & CATEGORY 2 BUDGET

Maximize Category 2 funding with this in-depth look at ErateWorks reporting tools and budget management features. Participants will see live demonstrations of the ERW Funding Dashboard, Customized Reports, and the ERW Category 2 Budget Tool. The session explains budget multipliers, enrollment data sources, and the structure of the five-year budget cycle. Attendees will gain practical strategies for tracking remaining funds, forecasting future needs, and making data-driven decisions that support effective long-term infrastructure planning.

## INTRODUCTION TO ERW

This session provides a comprehensive overview of the ERW platform and its role in simplifying and strengthening E-Rate program management. Designed for both new and experienced users, the class introduces the core tools within ERW and demonstrates how they work together to support compliant procurement, document management, reporting, and funding oversight. Participants will gain a clear understanding of how ERW streamlines workflows, enhances transparency, and supports audit readiness across the E-Rate lifecycle. The session also highlights key features, navigation tips, and best practices to help districts maximize

efficiency and fully leverage the capabilities of the platform.

## TECH WORKSHOPS

### INTELESYS: ARTICULATING ARTIFICIAL INTELLIGENCE

Cyberattacks have radically evolved—from opportunistic malware to targeted, business-disrupting campaigns powered by automation and AI. In this session, we'll look back to how attacks have changed over the years, what the modern-day cybersecurity tool stack should look like today, and why "it's not if, it's when" should shape every organization's recovery plan. You'll learn about the most common attack types. We'll also tackle why continuous security awareness training is your strongest control and your greatest challenge. Finally, we'll look at the 2026 threat landscape—AI-driven attacks and agent-enabled adversaries—and what's next, including deepfake audio/video and the emerging implications of quantum-era risk.

### INTELESYS: THE FUTURE IS CYBER SECURE

Artificial Intelligence is here to stay, and business leaders must understand, govern, and leverage it responsibly. This session takes a look at the history of AI and why generative AI represents a turning point for productivity and decision-making. Attendees will gain a clear view of what AI can realistically do today, where organizations often stumble, and how unchecked adoption can introduce risk to data, people, and reputation. We'll explore practical ways to harness AI's capabilities while putting the right safeguards in place—protecting your organization, your staff, and your customers without slowing innovation. From establishing responsible use guidelines to identifying high value business use cases, this session equips leaders with the clarity and confidence needed to adopt AI thoughtfully, securely, and strategically.

# REGISTRATION



## EARLY BIRD

**\$575**  
per registrant\*

\*On or Before 6/30/2026

## STANDARD

**\$650**  
per registrant\*

\*After 6/30/2026



## REGISTRATION INCLUDES

- Entrance To Over 20 Specialized Sessions & Workshops
- Sessions Workbook & Conference Registrant Package
- Wednesday Evening Conference Reception For Registrant
- Thursday Morning Breakfast For Registrant
- Thursday Afternoon Luncheon For Registrant
- Friday Morning Breakfast For Registrant
- 3 Days of Exciting Experiences



## CONFIRMATIONS

- You will receive an email notification confirming your registration
- Bring your confirmation to the registration area for check-in

# ABOUT DISNEY'S GRAND CALIFORNIAN HOTEL & SPA



**\$409**  
per night

Taxes, Fees, & Parking  
not included.

## STANDARD RATES

~~\$1085~~ per night\*

We've secured discounted room rates for attendees of the ERW User Conference. Spaces are limited and we anticipate these rooms to sell out. Book today for the best price!

*\*Prices from Disneyland Resort Booking Portal at [disneyland.disney.go.com](https://disneyland.disney.go.com)*



## BOOK NOW FOR THE BEST PRICE!

We anticipate this event to sell out, make sure to book early to secure your room at the 2026 ERW User Conference!



## DISCOUNTED ROOMS

Discounted rooms with views of Downtown Disney and a guest access gate to Disney's California Adventure Park.



## WORLD CLASS DINING

From Napa Rose to Storyteller Cafe, you'll find culinary delights at the Grand Californian Hotel & Spa, as well as at our event included meals!



## PARK ACCESS

Enjoy the Hotel's guest gate access into Disney's California Adventure Theme Park and easy access to Downtown Disney.



**CSM'S 2026**  
**e-rate works**  
**USER CONFERENCE**

**THIS FORM IS FILLABLE!**

Once you've downloaded this document, you can type directly into the form's fields. Once you've completed your Registration Form, you can either save it and email it into [conference@csmcentral.com](mailto:conference@csmcentral.com), or print it out and mail it to:

CSM Consulting, Inc.  
 PO Box 4408,  
 El Dorado Hills, CA 95762

**REGISTRATION FORM**

NAME

ORGANIZATION

DEPARTMENT

TITLE

ADDRESS

CITY/STATE/ZIP

PHONE

EMAIL

**ADDITIONAL REGISTRANTS**

	<b>1</b>		<b>2</b>		<b>3</b>
NAME	_____	NAME	_____	NAME	_____
TITLE	_____	TITLE	_____	TITLE	_____
DEPARTMENT	_____	DEPARTMENT	_____	DEPARTMENT	_____
EMAIL	_____	EMAIL	_____	EMAIL	_____

**REGISTRATION COSTS**

Number of Standard Registrants \_\_\_\_ X \$575<sup>00</sup> \_\_\_\_\_

**TOTAL COST \$** \_\_\_\_\_

**TERMS & CONDITIONS**

By registering for CSM's 2026 E-RateWorks User Conference, you agree to the specified terms and conditions listed on the reverse side of this page. If you have any questions regarding these terms or the deadlines within, please reach out to us at [conference@csmcentral.com](mailto:conference@csmcentral.com).

**TO REGISTER USING A PURCHASE ORDER**

1. Complete the Registration Form
2. Send the Registration Form and Purchase Order to [conference@csmcentral.com](mailto:conference@csmcentral.com)
3. An Invoice will be mailed upon receipt

**TO REGISTER WITH A CHECK**

1. Complete the Registration Form
2. Send in your Registration Form and Check to:  
**CSM Consulting, Inc.**  
 PO Box 4408  
 El Dorado Hills, CA 95762

**TO REGISTER WITH A CREDIT CARD**

1. Go to our Conference Payment Portal located at:  
**[INSERT URL]**



©2026 CSM Consulting, Inc.

# REGISTRATION TERMS & CONDITIONS

## IMPORTANT DEADLINES

June 30 <sup>th</sup> , 2026	Early Bird Registration Ends
September 11 <sup>th</sup> , 2026	Final Day To Submit Cancellation Request
September 25 <sup>th</sup> , 2026	Final Day To Submit Substitution/Transfer Request
October 9 <sup>th</sup> , 2026	Registration Closes
October 14 <sup>th</sup> , 2026	First Day of User Conference

## REGISTRATION DEADLINES

Early-Bird Registration for the 2026 ERW User Conference ends on June 30th, 2026. Registration prices increase to the Standard Registration on July 1st, 2026. Registrations received on or after June 30th will be billed for the Standard Registration price. Early-Bird Registrations with check payments postmarked by June 30th, 2026 will be accepted.

Registration closes on October 9th, 2026. Onsite registration may be available during the event but are subject to availability. If you have any questions regarding onsite registration, please submit them to [conference@csmcntral.com](mailto:conference@csmcntral.com).

## CANCELLATION POLICY

You must send any cancellation request in writing to the CSM offices no later than September 11th, 2026, by 5:00 pm. You may email your cancellation request to [conference@csmcntral.com](mailto:conference@csmcntral.com). CSM cannot provide any refunds for cancellations received after September 11th, 2026, or for no-shows, due to guarantees and prepayments that CSM must make to vendors and suppliers. Attendees must submit a cancellation request in writing by September 11th, whether or not payment has been submitted. If you fail to cancel your registration by September 11th, 2026, you will be required to pay for your registration.

## SUBSTITUTIONS & TRANSFERS

CSM Substituting/Transferring of registrations to another individual will be accepted in writing before September 25th, 2026. If you need to transfer your registration to another individual, please send your request to [conference@csmcntral.com](mailto:conference@csmcntral.com).

## PHOTO & VIDEO RELEASE

By registering and attending the 2026 ERW User Conference, all attendees hereby authorize and grant CSM Consulting, Inc. the right to:

- Record all participants (picture and voice) on photographs, video, and audio for production
- Edit photographs, video, and audio into a gallery, film, or other multimedia production
- Use the name and likeness, voice, or other information concerning all participants
- Screen or place online (including social media) any recordings

These recordings can be used for the promotion of CSM Consulting, Inc., and/or its vendors.

## LIABILITY POLICY

By registering for the 2026 ERW User Conference (the "Activity"), organized by CSM Consulting, Inc., ("Releasee"), the Registrant ("Attendee") hereby agrees to the following:

The Attendee and anyone claiming on their behalf release and forever discharge Releasee and its affiliates, successors and assigns, officers, employees, representatives, partners, agents, and anyone claiming through them (collectively, the "Released Parties"), in their individual and/or corporate capacities from causes of action of any nature and kind, known or unknown, which the Attendee may have against Releasee or any Released Parties arising out of or relating to any injury, loss or damage to person and property that may be sustained as a result of participation in the Activity ("Claims").

The Attendee agrees to indemnify Releasee against any and all claims, actions, lawsuits, damages and judgments, including attorney's fees, arising out of or relating to their participation in the Activity.

This Release for Participation in Event or Activity ("Release") shall not be in any way construed as an admission by the Releasee that it has acted wrongfully with respect to the Attendee or any other person, that it admits liability or responsibility at any time for any purpose, or that the Attendee has any rights whatsoever against the Releasee.

This Release shall be binding upon the parties and their respective heirs, administrators, personal representatives, executors, successors and assigns. The Attendee has the authority to release the Claims and have not assigned or transferred any Claims to any other party. The provisions of this Release are severable. If any provision is held to be invalid or unenforceable, it shall not affect the validity or enforceability of any other provision. This Release constitutes the entire agreement between the parties and supersedes any prior oral or written agreements or understandings between the parties concerning the subject matter of this Release. This Release may not be altered, amended or modified. The terms of this Release shall be governed by and construed in accordance with the laws of the State of California.