

## INSTRUCTIONS FOR BUDGET/INVENTORY ANALYSIS FOR E-RATE COMPONENTS OF TECHNOLOGY PLANS

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Although not every educational technology goal makes use of services or equipment funded by E-rate, the majority of them do. For each goal that does, a district must be able to demonstrate that budget requirements to pay for their share of the cost of the service or equipment are addressed. It is also necessary to demonstrate the applicant's ability to acquire and pay for all of the E-rate **ineligible** services and equipment which is needed to reach the educational goal (e.g. *training, infrastructure, software*).

**For each E-rate request, fill out an analysis sheet.** The sheet is in Microsoft Word format. Cells will increase in size to contain the necessary information. After filling in the identifying information, in the first block list the service for which you are requesting E-rate support. The service may be distinct (cell phone service) or it may refer to a multiple of requests that combine into a unified service (interactive video service including sufficient bandwidth, interior wiring and leased equipment). You must be sure to combine all the costs and other requirements when analyzing a complex service.

**In the second block,** list the educational goals that will be addressed using the service(s) from block 1. Goals may be identified either by listing their page and section number in the district's technology plan or by a very brief narrative statement. There may be several goals involving a single service request.

**Current and new levels of service** should reflect the information in Block 3 of a Form 471 about current levels and levels after the new E-rate requests are filled.

**Budget** estimates should be based on a reasonable calculation of the total cost of the service multiplied by the district's percentage of the expected discount, which then reflects the amount that the district must be able to provide. **Budget sources** should reflect the specific part of the district's budget from which the funds will be paid, including line item numbers if available. Grant or donation funds or other sources outside the regular district income should be explained.

For **Non-Eligible Requirements** indicate the kind(s) of equipment or software which is needed to make use of the service which E-rate is/will be funding. Then indicate how much of that equipment or software is currently available. If more or newer is needed, indicate the amount required and estimate the cost of acquiring it along with the source of the funding (*see above*). If no further equipment or software is needed, enter zeros in both the New Required and the Budgeted \$ and Source of Funds fields. Remember that the district is responsible for the entire amount of these charges.

For **Professional Development**, indicate the kind of training required to make use of the requested service, report the number of staff and their level of training in that skill, indicate the amount of training still needed to be delivered and to whom, and enter the estimated cost of such training as well as the source of the funds needed. (*Remember that 25% of NCLB Title II funds may be used for technological professional development.*)

For **Retrofitting**, indicate any construction or rewiring which would be required to use the E-rate requested service along with an estimated cost and a budget source. If none is required, indicate None in the block.

For **Maintenance**, indicate any SEPARATE maintenance contracts with the type and location of equipment to be maintained along with estimated cost and a budget source. This amount may be eligible for discount IF the equipment involved is eligible. For maintenance contracts that are part of an eligible E-rate contract, indicate that maintenance is limited to the service and equipment listed in the E-rate request and that the cost is part of the amount listed in the Budget block above.

While there may be goals in the district's technology plan that do not require an Analysis Sheet because they are not affected by E-rate, **EVERY E-RATE REQUEST MUST BE REFERRED TO ON AN ANALYSIS SHEET.**



*The Analysis Sheet was prepared in accordance with Section 54.508(b) of the FCC's Rules and Regulations, Chapter 1 of Title 47 of the Code of Federal Regulations.*