

## 2009 Guidance for the Budget/Inventory Analysis for E-Rate Components

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 that are needed to reach the educational goal (e.g., training, infrastructure, software).

**While there may be E2T2 goals 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.**

Paragraph 59 of the Schools and Libraries Fifth Order, states that the Universal Service Administrative Company (USAC) has:

“been treating technology plans approved under the [United States] Department of Education’s Enhancing Education Through Technology (EETT) as acceptable technology plans subject to one qualification. Consistent with the [Federal Communications] Commission requirement that program applicants demonstrate that they have the necessary resources required to utilize E-Rate discounts, **USAC has required that the EETT technology plans be supplemented by an analysis that indicates that the applicant is aware of and will be able to secure the financial resources it will need to achieve its technology aims**, including technology training, software, and other elements outside the coverage of the Commission’s support program.”

The Budget/Inventory Analysis (BIA) indicates that the E-Rate applicant is aware of and will be able to secure the financial resources it will need to achieve its technology aims, including technology training, software, and other elements outside the coverage of E-Rate support.

### Directions for Successfully Completing your BIA

For each E-Rate request, fill out a BIA. The BIA is a Microsoft Word document. Information only needs to be entered into the non-shaded cells. Cells will increase in size to contain the necessary information.

#### Block 1: Identification

Identify your district or school, your name, and date this BIA was prepared.

#### Block 2: Analysis of E-Rate Services Requested

List the service for which you are requesting E-Rate support. The service may be distinct (cell phone service) or it may refer to multiple 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. Enter all costs on an annual basis.

#### Block 3: Educational Technology Plan Goals Addressed by E-Rate Services

List the educational goals that will be addressed using the service(s) from Block 2. Goals may be identified either by listing their page and section number from your Educational Technology Plan or by a brief narrative statement. There may be several goals involving a single service request.

#### Block 4: Evaluation of Goals

List the evaluation activities that will be used for the goal(s) from Block 3. Evaluation may be identified either by listing the page and section number in the Educational Technology Plan or by a very brief narrative statement (i.e., list the method for judging whether the goal in the second block is being reached; then suggest a possible reaction if the goal is not being reached). Evaluation activities may address multiple goal(s) and service(s).

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### Block 5: Budget Elements

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"Current Level of Service" and "Level After E-Rate Request has been Filled" are to be descriptive of your E-Rate services and amounts and they should reflect and agree with the information in Block 2 of your Form 471. These are not dollar figures.

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. These funds must already be approved, not a simple statement of application.

### Block 6: Analysis of Non E-Rate Eligible Requirements

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For Non-Eligible Requirements, indicate the kind(s) of equipment or software (Blocks 6a and 6b) that is needed to make use of the service that 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 "None" in the blocks under New Purchases, Budgeted Amount, and Funding Source. Remember that the district is responsible for the entire amount of these charges.

For Professional Development (Block 6c), 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, Part D funds may be used for technological professional development.)

For Retrofitting/Electrical Upgrades (Block 6d), indicate any construction or rewiring that 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 under Retrofitting. If there is sufficient electrical capacity currently available to support any technology added for next year, indicate "None" in the block under Electrical Upgrades. If you need to add new electrical wiring for your request to operate properly, state how many rooms/workspaces/offices/etc. will need to be rewired and estimate/ascertain the cost.

For Maintenance (Block 6e), 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 equipment. 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 Block 5: Budget Elements.

List the total budgeted amount for requirements not eligible for E-Rate funding in Block 6f.

Finally, submit your completed BIA to the Alaska Department of Education & Early Development (EED) before filing your E-Rate Form 470. When you submit your completed BIA to EED, you will receive a formal, dated letter of receipt, which you can add to your audit trail. Please send your completed BIA to:

E-mail: [tech.plan@alaska.gov](mailto:tech.plan@alaska.gov)

FAX: 907-465-2989

Mail: Educational Technology Clerk

801 West Tenth Street, PO Box 110500, Juneau, Alaska 99811-0500.

For answers to your E-Rate questions, contact Valerie Oliver at [erate@alaska.gov](mailto:erate@alaska.gov) or 907-227-4051.