



## **Tips from Learningtech: E-Rate Addendum to Tech Plan**

“The application process for Schools and Libraries support<sup>1</sup> begins with a technology assessment and a technology plan.”<sup>2</sup> This application process repeats annually; therefore, an assessment of technology is needed annually. “All approved plans should include provisions for evaluating progress toward the plan's goals, and ideally these assessments should occur on an annual basis.”<sup>3</sup>

For schools with EETT<sup>4</sup> Technology Plans, the annual assessment requirement is met through the completion of the E-Rate Supplemental Budget Analysis for EETT Technology Plan<sup>5</sup> (also known as: E-Rate Addendum). It is intended to assist with forward planning for the next year of E-Rate funding. This E-Rate Addendum works effectively for schools with E-Rate level Technology Plans, as well. The form recommendation is to “Complete an E-rate supplemental budget analysis annually and retain it locally with your state-approved EETT technology plan for audit purposes.”

### **Tips for completing the E-Rate Addendum:**

- Work from your approved technology plan
- Be sure the plan covers the year of funding to be requested
- Assess where you are with goals and timelines, noting status on the addendum form
- For Part 5, categorize each line item of the budget (infrastructure, hardware, software, etc.) to get the subtotals for each section (5a, 5b, 5c, etc)
- “Retain it locally” means: you don’t turn it in to anyone; you don’t file it with an agency; you just keep it. However, emailing it to Learningtech, and copying yourself, provides timestamp proof that it was completed timely
- **We recommend making your text font distinct** from the form text font, just to make it more obvious what you wrote, and therefore which words need to be reviewed / checked from year to year
- If your schools' tech plans were approved individually, you must do one E-Rate Addendum for each school; there will be some overlap/reiteration on shared services
- The E-Rate Addendum is a task that you can do entirely yourself, or Learningtech can assist you with it, as you prefer
- The E-Rate Addendum should be completed **PRIOR TO** filing the Form 470 for each funding year. Typically, Form 470s are filed in the November – December timeframe. Thus, E-Rate Addendums should be completed by mid-November.

***The next year’s E-Rate application process cannot begin until this addendum is completed.***

---

<sup>1</sup> From Overview of the Program: “The Schools and Libraries Program of the Universal Service Fund, commonly known as “E-Rate,” is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC), and provides discounts to assist most schools and libraries in the United States to obtain affordable telecommunications and Internet access.”

<sup>2</sup> From Step 2: Develop a Technology Plan, <http://www.universalservice.org/sl/applicants/step02/>

<sup>3</sup> <http://www.universalservice.org/sl/applicants/step02/faq-about-technology-planning.aspx#5>

<sup>4</sup> EETT = Enhancing Education Through Technology

<sup>5</sup> From <http://www.cde.ca.gov/ls/et/ft/eratemain.asp>, “An approved EETT technology plan is acceptable for E-rate application purposes with the addition of the [E-rate Supplemental Budget Analysis form](#).” NOTE: be sure to verify that the form is current before you do the work – sometimes CDE makes changes.