ILLUSTRATIVE SAMPLE / FICTIONAL INSTITUTION

FY2027 connectivity. A clearer decision.

Example Learning District

Example review format. All observations below are fictional and require verification.

FY2027 recurring-service year
July 1, 2027 – June 30, 2028

A working brief for your team.

REVIEW AREA	QUESTION TO RESOLVE	EVIDENCE NEEDED
Category One	Does the internet agreement cover the intended sites, capacity, and service year?	Signed agreement, circuit list, current charges, and renewal notice.
Category Two	Where do campus coverage and equipment need closer review?	Site inventory, coverage assessment, equipment list, and maintenance scope.
Separate budgets	Which technology and operating costs need a separate funding decision?	Itemized scope for AI, voice, security, software, utilities, and advisory services.

Connectivity priorities

A site and service inventory, capacity questions, renewal dates, and items to check for Category One or Category Two eligibility.

Spend & renewal findings

An evidence-linked list of charges, contract discrepancies, unused services, and renewals worth reviewing.

A practical action plan

Recommended next steps with owners, dependencies, and questions for your providers or E-Rate specialist.

Who owns the application?
Your authorized applicant team or E-Rate specialist prepares and certifies applications. A potential bidder must remain separate from Form 470 and bid-specification preparation. Confirm each proposed item against FY2027 eligibility guidance.

Primary guidance: USAC Eligible Services List · USAC bidding requirements
Discuss the scope of your review at ubntag.com/erate.

ILLUSTRATIVE SAMPLE / NO CUSTOMER RESULTS CLAIMED

From observations to accountable next steps.

This example register shows the evidence, owner, and action attached to each question. It does not establish an overcharge, savings amount, or entitlement to a credit.

CONNECTIVITY — NEEDS EVIDENCE

Internet contract renews before the next service year.

Check the source	Signed agreement, circuit inventory, and renewal notice.
Next action	Confirm the notice date and capacity requirement before comparing options.
Owner	Technology director

RECURRING COSTS — NEEDS VERIFICATION

A circuit may still be billed after a site move.

Check the source	Invoice service dates, cancellation request, and provider acknowledgment.
Next action	Reconcile the dates and request a written provider explanation.
Owner	Business office

SOFTWARE — NEEDS REVIEW

Assigned licenses may include former staff.

Check the source	Current staff list, license assignments, usage report, and subscription terms.
Next action	Confirm current ownership and renewal terms before changing seats.
Owner	IT + procurement

Prepare for the conversation.

- Identify your sites, main concern, and upcoming renewal dates.
- Agree scope, fees, delivery date, and any provider compensation in writing.
- Arrange a secure handoff before sharing bills, contracts, or account details.

About this sample

This is a demonstration of TAG's proposed review format using a fictional institution. Actual findings depend on authorized source records. Your team approves provider changes; recoveries and credits depend on evidence and provider decisions. This document is not a funding application or price quote.