Montana

Office of Public Instruction

ESSER Guidance Sessions – February

Transition Planning

Prepare, Prevent, and Respond

February 16, 2023

PRESENTER

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ESSER Team Contact Info

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- Mindi Askelson, E-Grants Designer
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Goals For This Session

- Transition Planning Considerations
  - Accounts and Contact Info
  - Need-to-Know ESSER info
  - ESSER Grant Tracking
- Wrap-Up and OPI Resources
- Q&A

Transition Planning

- How will your replacement pick up?
  - Historical/Contextual knowledge
  - Content knowledge
  - Organization culture
  - Staff
  - Gems/Tips to pass along
- This information needs to be communicated.
  - Clear communication/training
  - Documentation

Document Flow Diagram & Critical Paths

- Information flows
  - Who needs what? When?
  - Who has the needed data? When can you get it?
  - Reports and format

- You receive invoices but didn't know you need access ID.
- You received an email indicating you had to complete an ESSER Report, but you don't know what software/portal to use, and you can't find any ESSER report on your server.
- Somebody made the last file, but you aren't sure where it is. In a binder? On a shelf? On their laptop? On the server? What is the file called??

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Example

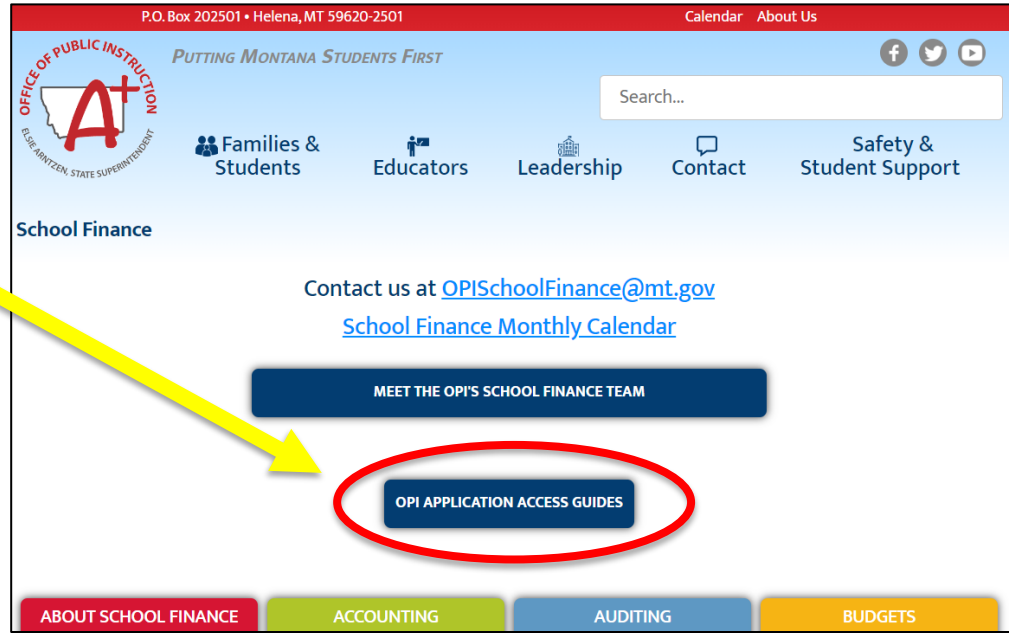
Name	Responsible for Creating	Due Date	Responsible for Distribution & Due Date	Key Audience and email submission	Reports partnered with (data pulled from or input to)	Description	File Name and Storage	Comments
Monthly								
ESSER District Monthly Status								
ESSER Board of Trustee Monthly Status								
EANS Monthly Status								
Visual State Status update (thermometer)								
Compass								
Navigator								
FER								
Audit Finding Monthly Status Update								
ESSER Website updates								
OPI Broadband Website updates								
ESSER mini grant reminder/updates								
ESSER Team workflow								
Quarterly								
OBPP Governors Quarterly								
Guideance Calendar								
Guidance Fact Sheets								
Safe Return and ARP Plan Summary Status								
EANS Status Update								
DOE								
Annually								
MOE ESSER report								
HB 630 and 632 report								
Mode of Instruction								
MAEFAIRS Annual Report								
ESSER Annual Report								
EANS Annual Report								

Key Contacts and Connections

- List of Contacts
  - Name, Title, Email, Phone
  - Organization/Department
  - Source of Information (Why are they important?)
- Meetings
  - Regular, Periodic
  - Organization Name, When/Time/Reoccurrence, Purpose/For What?
- Software/Portal Access
  - OPI Access Quick Guide

School Finance info for Supers/Clerks

- QuickStart Guides for NEW Clerks and Superintendents
  - The OPI has compiled information to assist new clerks, district superintendents and county superintendents in their new roles. Please see the documents located on the School Finance webpage.
  - https://opi.mt.gov/Portals/182/Page%20Files/School%20Finance/QUICKSTART%20GUIDES/OPI%20Access%20QuickGuide.pdf?ver=2022-09-16-111917-737
- PERSONNEL CHANGES
  - Changes to board chair, clerk/business manager, superintendent, or principal must be changed in OPI Contacts. Instructions for how to make these changes are found here. If you have question about how to complete the updates, please contact: CentralUpdates@mt.gov.

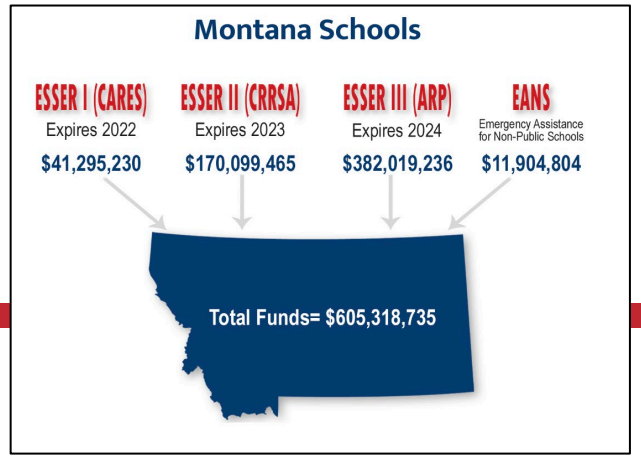


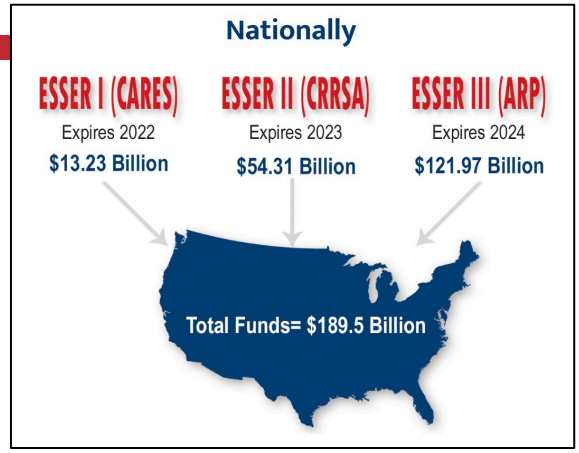
https://opi.mt.gov/Leadership/Finance-Grants/School-Finance

Funding Sources

- Grants
  - Compliances, Past Reports, Guidance
  - Calendar of key events and activities
  - Reporting
  - Proposed grants, changes
- Partnership Agencies
  - Program, Funding, Staffing
    - Examples: Americorp Vista, Teacher Residency, Extension Office, University Internships

ESSER Overview





Welcome to the ESSER Grants!

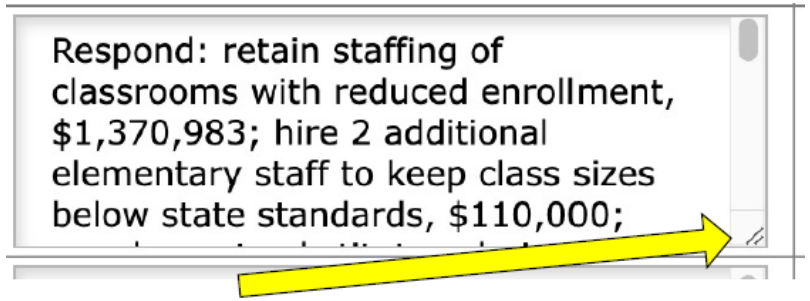
- **ESSER** = **E**lementary & **S**econdary **S**chool **E**mergency **R**elief
  - ESSER I (CARES) – Expired 2022
  - ESSER II (CRRSA) – Expires 2023
  - ESSER III (ARP) – Expires 2024

- **ESSER Purpose:** Preparing for, Preventing, & Responding to the effects of the COVID-19 pandemic.

- OPI Guidance/Training Sessions on ESSER
- ESSER State and District Plans
- ESSER Data Collection Annual Report

Tips to Pass Along

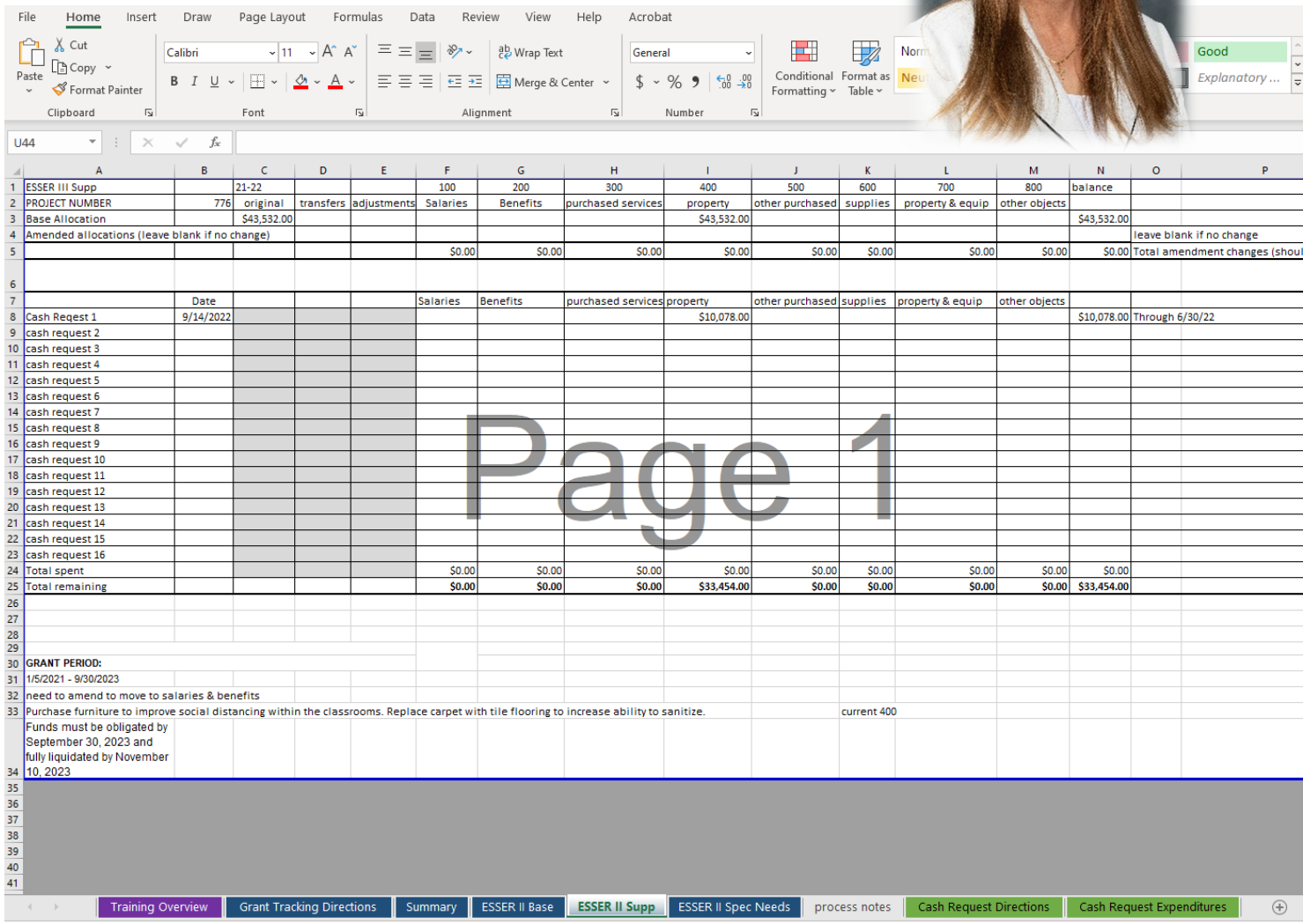
- Training you attended that was invaluable
- Drop-down fiscal year in E-Grants
- Three expansion bars
- No-Reply email of importance
- Large Items or projects need **School Board** and **OPI approval.**



A Clerk's Workbook for ESSER Grants

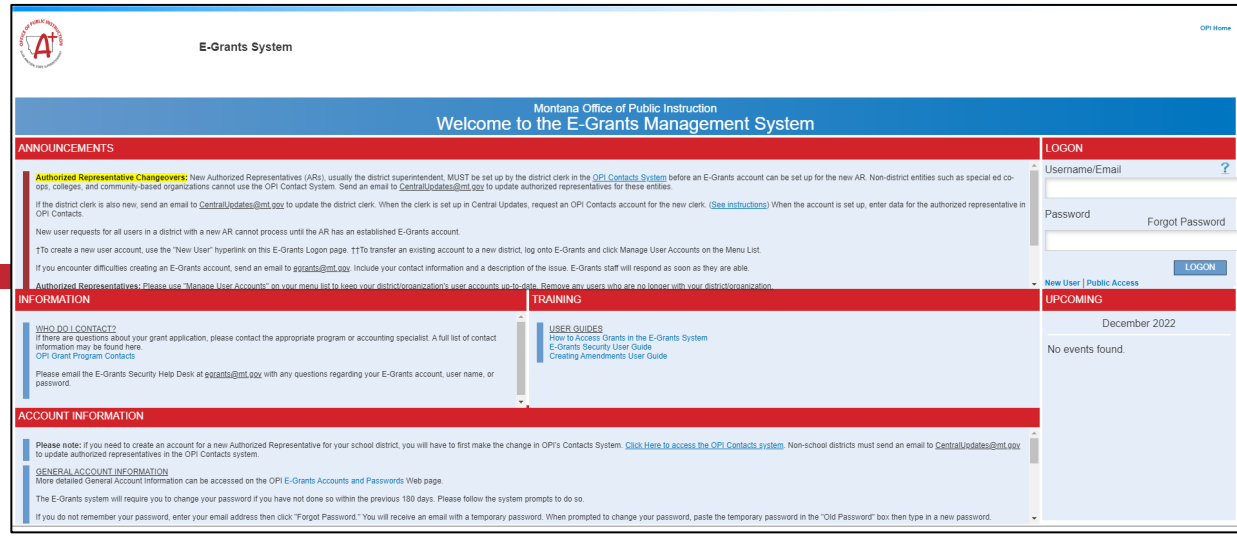
THANK YOU to **Jolene Tollenaar,** Director of Business Services / District Clerk, Corvallis School District

- Jolene developed an Excel spreadsheet to help with tracking all the different aspects of ESSER grants
- Jolene's training in October can be viewed here: https://youtu.be/Y8w93S1rO74



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	ESSER III Supp		21-22			100	200	300	400	500	600	700	800	balance		
2	PROJECT NUMBER	776	original	transfers	adjustments	Salaries	Benefits	purchased services	property	other purchased	supplies	property & equip	other objects			
3	Base Allocation		$43,532.00						$43,532.00					$43,532.00		
4	Amended allocations (leave blank if no change)														leave blank if no change	
5						$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	Total amendment changes (shoul	
6																
7		Date				Salaries	Benefits	purchased services	property	other purchased	supplies	property & equip	other objects			
8	Cash Reqest 1	9/14/2022							$10,078.00					$10,078.00	Through 6/30/22	
9	cash request 2															
10	cash request 3															
11	cash request 4															
12	cash request 5															
13	cash request 6															
14	cash request 7															
15	cash request 8															
16	cash request 9															
17	cash request 10															
18	cash request 11															
19	cash request 12															
20	cash request 13															
21	cash request 14															
22	cash request 15															
23	cash request 16															
24	Total spent					$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00		
25	Total remaining					$0.00	$0.00	$0.00	$33,454.00	$0.00	$0.00	$0.00	$0.00	$33,454.00		
26																
27																
28																
29																
30	GRANT PERIOD:															
31	1/5/2021 - 9/30/2023															
32	need to amend to move to salaries & benefits															
33	Purchase furniture to improve social distancing within the classrooms. Replace carpet with tile flooring to increase ability to sanitize.										current 400					
34	Funds must be obligated by September 30, 2023 and fully liquidated by November 10, 2023															
35																
36																
37																
38																
39																
40																
41																

E-Grants Overview



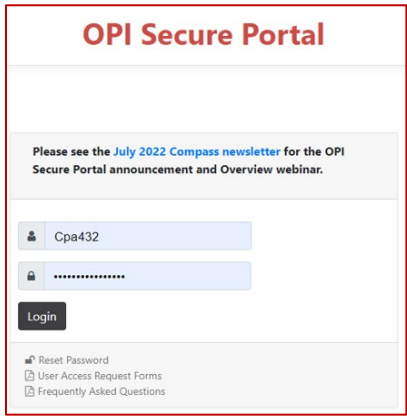
E-Grants Login Page:
https://egrants.opi.mt.gov/opigmsweb/logon.aspx

OPI has offered several in-depth E-Grants trainings, which can be viewed below or on the OPI ESSER website:

- **Navigating E-Grants** – August 9, 2022 https://youtu.be/Fjpm7h490ek
- **Amendments** – September 21, 2022 https://youtu.be/ShOIw9eLo2Q
- **Cash Requests** – September 22, 2022 https://youtu.be/nHb7p7xC4Ds
- **E-Grants Prep & Processing** – October 18, 2022 https://youtu.be/Y8w93S1rO74
- **E-Grants Error Messages** – October 17, 2022 https://youtu.be/KcaSy23PZsM

Contact Info – Security Changes

- Despite your name(s) not showing on the Contact Tab, *you have all the rights of the previous staff members*
- To ensure that your name is listed on any <u>new</u> grants you submit, please have your Clerk go to **OPI Contact** and make that change.
  - **OPI Contact** can be found at: https://apps.opi.mt.gov/osp/
  - *It may take several weeks for the OPI Contact information to get the changes into E-Grants*



To Modify an Existing E-Grants Account:

Add or change access to an additional Legal Entity, or add additional roles or rights within a given Legal Entity

1. Select **Manage User Accounts**.
2. On the **Manage User Accounts** page, the user will see a link with their name.
   a. If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity
3. **Amend Current Access** to add an additional business role to an existing assigned LE.
4. **Add Additional LE** to request access to a different LE.
5. Once all new requested access has been added to your screen, select **Request** to submit your request to the LE's AR.

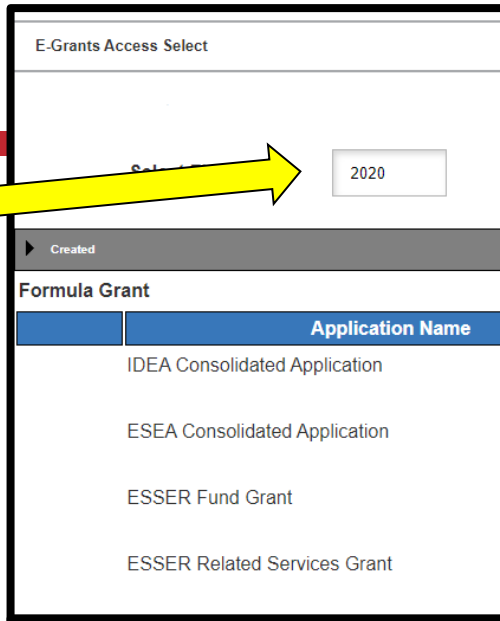
NOTE: Only the Authorized Representative may remove a user's access from an LE. <u>Non-AR users may not remove themselves.</u>

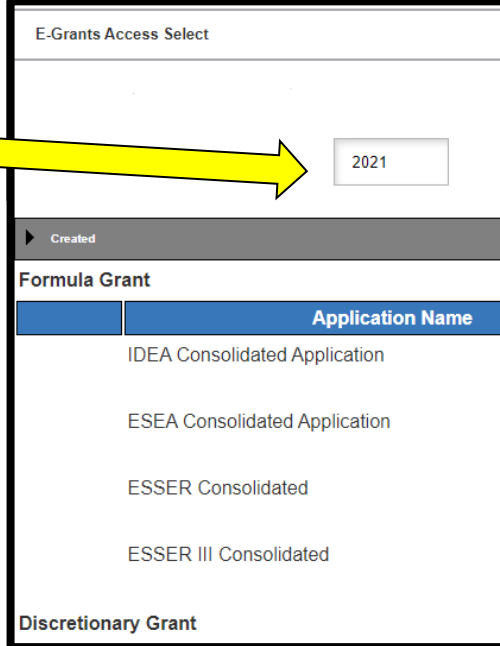
Finding the ESSER Grants

- Fiscal Year 2020 (*2019-20*)
  - **ESSER Fund Grant** – this is **ESSER I**
  - **ESSER Related Services Grant** – this is also **ESSER I**

OPI offered a more in-depth training in August, which you can view here: https://youtu.be/Fjpm7h490ek

- Fiscal Year 2021 (*2020-21*)
  - **ESSER Consolidated** – this is **ESSER II**
  - **ESSER III Consolidated** – this is **ESSER III**
  - **ARP Summer**
  - **ARP Afterschool**
  - **ESSER Consolidated Special ELO**

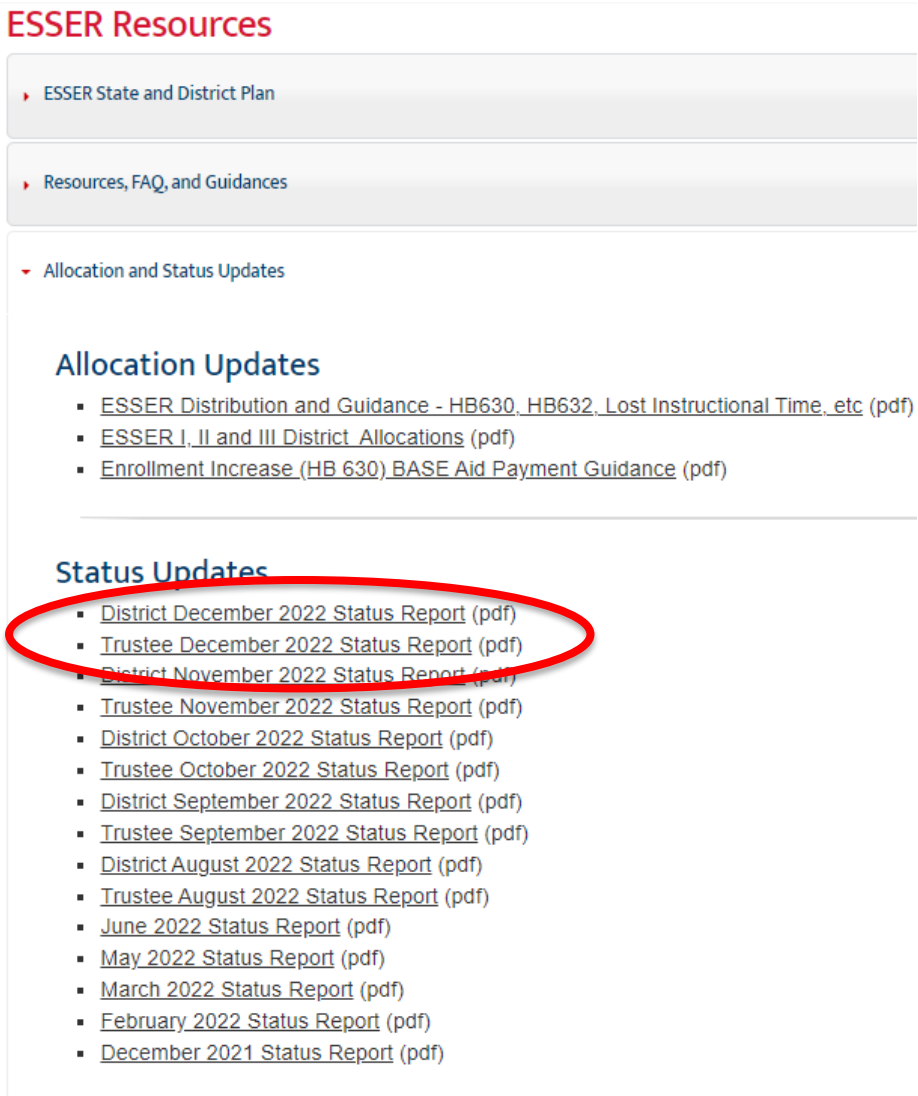




OPI Monthly Allocation/Status Report

- On the OPI ESSER Website at: https://opi.mt.gov/COVID-19-Information/ESSER

- Under ESSER Resources > Allocation and Status Updates
  - District/Trustee updates produced monthly
  - Show high-level view of school status:
    - Overall Allocation
    - Allocation within each budget program
    - Expenditures to date
    - Remaining balance



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Resources at OPI.MT.GOV

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PUTTING MONTANA STUDENTS FIRST

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Montana Office of Public Instruction

OFFICE OF THE SUPERINTENDENT

Welcome to the Office of Public Instruction

Superintendent Elsie Arntzen is proud to serve our Montana families, students, and teachers. **Families are the foundation of learning as our parents are our first teachers.** Our students are our most precious resource and the future of this great state. As a teacher of 23 years, the Superintendent knows the importance of quality educators in the classroom and is working to ensure Montana teachers have the flexibility needed to put our Montana students first.

The Montana Office of Public Instruction (OPI) is charged with the responsibility of providing technical assistance in:

- School Finance
- School Law
- Teacher Certification and Licensing
- School Accreditation
- Teaching and Learning Standards

The OPI staff administer a number of federally funded programs and provide a variety of information services, including the information systems necessary to assess student achievement and the quality of Montana's elementary and secondary school systems.

- 2021-2022 Summative
- 2023 Teacher of the Year
- Meet the Executive Staff
- OPI Organizational Chart
- See OPI Press Releases
- ESSER
- EANS
- Broadband
- Assessment Scores

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PUTTING MONTANA STUDENTS FIRST

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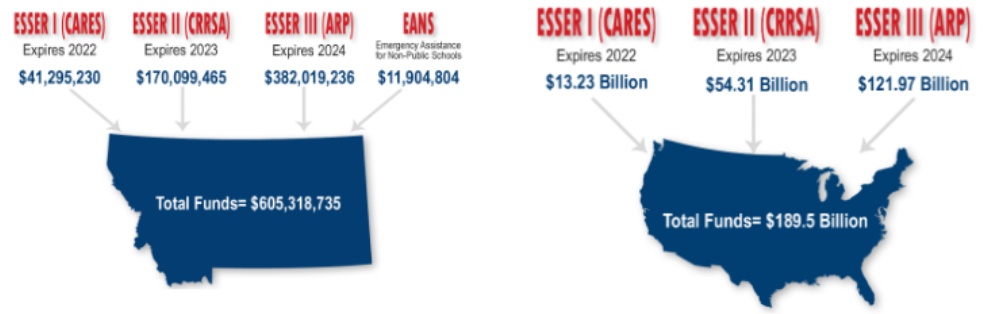
Elementary & Secondary School Emergency Relief (ESSER)

Welcome to the Emergency American Rescue Plan (ARP) and Elementary and Secondary School Emergency Relief (ESSER) webpage for the Office of Public Instruction

Superintendent Elsie Arntzen is proud to serve our Montana families, students, and teachers through the administration of the ESSER education funding of just over $605 million. Each district was awarded ESSER funding based on Title I student count. Across the state, Districts are using ESSER funding in innovative, valuable ways, enabling schools and their partners to implement highly effective and beneficial programs. The countdown is here with ESSER I (CARES) expiring 2022, ESSER II (CRRSA) expiring 2023, and ESSER III (ARP) expiring 2024 (comparison chart p.4). OPI has established a system of support to ensure grant funding compliance and provide advocacy in use of funds.

MEET THE ESSER / EANS TEAM

CLICK TO WATCH THE ESSER FUNDING USE PANEL DISCUSSION

Elementary and Secondary School Emergency Relief (ESSER)