



Montana

Office of Public Instruction

Wendi Fawns, ESSER/EANS Director

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Navigating Grant Compliance - June 2022

Office of Public Instruction in Partnership with FACTS

Montana ESSER Funding

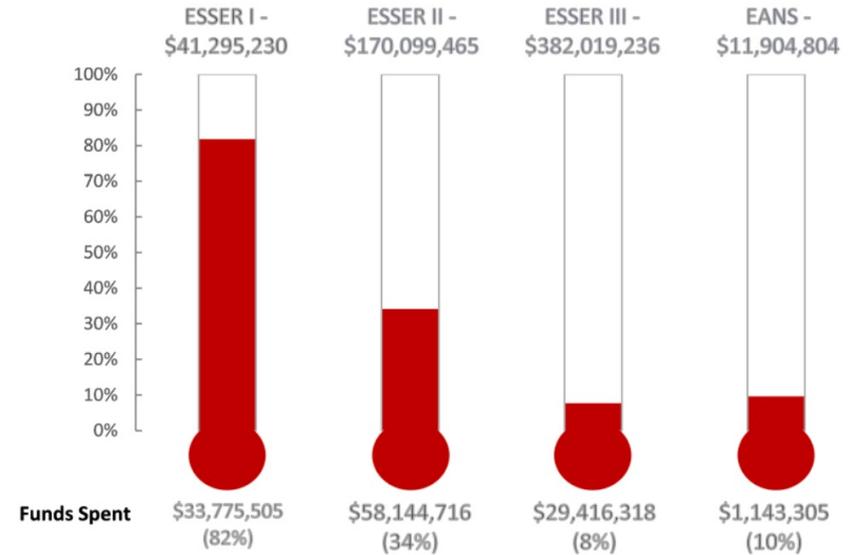
Elementary and Secondary School Emergency Relief Fund:

- 3 Rounds of funds authorized by Congress in response to COVID-19 pandemic.



COVID Related Funding Spent

• May 13, 2022 •





Nonpublic School Funding

- EANS ARP awarded through OPI Intent to Apply application
- FACTS Solutions administers purchasing process
- Funds not allocated were reverted to GEER funds
- Governor's Office administers GEER Funds
 - Similar criteria but not the same as EANS
 - Similar process but not the same as EANS
 - [GEER FAQ](#)
 - <https://governor.mt.gov/geer>

Emergency – short term vs long term



- Funds awarded before needs assessment
- Administration of grant changing
- Transparency required

- [Apollo 13 square peg](#)

- https://www.youtube.com/watch?v=ry55--J4_VQ



Second Opinion, Suggestion, Comments

- OPI offers a System of Support for EANS Applicants
 - Procurement of items and services
 - Technical questions, Suggestions, Comments
 - Second Opinion – FACTS will notify OPI why an item has been denied; OPI will investigate further compliance of the request and if necessary request the awardee to submit a form identifying why they believe their request should be reviewed. Prepare, prevent, respond, and FAQ will help the awardee request a second opinion. *Please review the grant goals and guidelines.*

Montana CRRSA EANS & ARP EANS with FACTS Education Solutions



FACTS Ed's EANS Montana Support Team



Sarah Noble, Manager-Fiscal Agent & Financial Operations snoble@factsmgt.com

Shannon Farnworth, Team Lead, EANS sfarnworth@factsmgt.com

Susan Abelein, Academic Services Director sabelein@factsmgt.com

Tiffany Wilbur, Educator Services Director twilbur@factsmgt.com

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Jamie Maxwell, Partner Success Manager jamie.maxwell@nelnet.net

Talia Klepper, Partner Success Manager tklepper@factsmgt.com

Jackie Degel, Regional Vice President jdegel@factsmgt.com



FACTS Education Solutions

Today's Agenda

- Meet the FACTS Ed Team
- Completing the Budget Workbook
- Approval Process for Budget Workbook
- Editing Your Budget Throughout the Funding Time Period
- Requesting Procurement of Materials
- Software to Identify and Address Learning Loss
- Professional Development Options
- Instructional Coaching Topics
- Q & A



Sarah Noble
*Manager – Fiscal Agent &
Financial Operations*



Shannon Farnworth
Team Lead - EANS





Talia Klepper
Partner Success Manager



Jamie Maxwell
Partner Success Manager

Budget Workbook



The Budget Workbook will be completed first to identify all request for EANS funding.

FACTS Ed
sends Budget
to school

School
Completes
Budget

FACTS Ed
Reviews /
Approves

School
Receives
Approved
Budget

School
Submits
Requests via
Dynamic
Forms

Sample: [Budget Workbook](#)

Dynamic Forms



- Platform used to submit requests after budget is approved.
- Username / Password will be required (must be created, will not be assigned)
- Two types of Requests
 - **Payment** to vendors for approved items and services
 - **Credit Card Procurement**
- If your form is incomplete, you will receive an email back with instructions with action items. Please do not respond to that email if you have questions as it is not monitored. Please contact your partner success manager with questions on Dynamic Forms.

Requests run on Net30: Meaning within 30 days of submission - payment or purchase will take place.

**If the request is submitted incomplete, this could delay timing.

Dynamic Form: [Dynamic Forms Tips and Tricks](#)



Requesting Payment



FACTS Ed will directly pay vendor via check/ACH on behalf of the school.

Required: Invoice & W9

Examples: Invoices from Vendors for materials or services.

We cannot pay a Purchase Order or Quote.

We cannot prepay services.

Example: School has an invoice from Best Buy for laptops they need FACTS Ed to pay.

Dynamic Form: [How to Submit A Payment Request](#)



Requesting Credit Card Procurement



FACTS Ed will purchase items via credit card on behalf of the school.

Required: Information on materials wanted (Spreadsheet / Links)

Examples: Materials or items that can only be purchased with a credit card (typically online)

Example: School would like FACTS Ed to go online to Best Buy's website to purchase laptops.

Dynamic Form: [How to Submit A Credit Card Request](#)

Spend Down Reports



- Sent Monthly

School Name



EANS Funding

Date	Transaction Type	Item	Disinfectant Supplies	PPE	Ventilation Improvements	Training & PD on Sanitation	Physical Barriers	Materials / Supplies	Coronavirus Testing	Educational Technology	Redevelop Instructional Plans	Leasing of Sites or Spaces	Reasonable Transportation	Maintaining Education & Learning	Total	Status	Invoice#
Allocations>>>			\$290.87									\$ 23,684.13			\$ 28,684.13		
6/22/21	Payment	Frog Publications-iReady Mathematics Books 3-8									\$ 1,254.00				\$ 1,254.00	Invoiced	CI-000025689 SMS70
6/29/21	Payment	Hand2mind Curriculum									\$ 3,071.91				\$ 3,071.91	Invoiced	CI-000026391 SCF127
6/29/21	Payment	McGraw-Hill Education - Math									\$ 5,176.76				\$ 5,176.76	Invoiced	CI-000026391 SCF128
8/17/21	Payment	McGraw Hill-Corrective Reading Curriculum									\$ 3,002.76				\$ 3,002.76	Invoiced	CI-000043157 SCF641
8/31/21	Payment	McGraw Hill - 118241508001									\$ 1,256.40				\$ 1,256.40	Invoiced	CI-000043822 SCF750
11/9/21	Payment	Amazon - Laptop Purchase (25)								\$ 5,000.00					\$ 5,000.00	Invoiced	CI-000068503 SCF948
2/1/22	Payment	Amazon Invoice - Masks		\$290.87											\$ 290.87	Projected	
															\$ -		
															\$ -		
															\$ -		
Total Usage			\$ -	\$290.87		\$ -	\$ -	\$ -	\$ -	\$ 5,000.00	\$ 13,761.83	\$ -	\$ -	\$ -	\$ 19,052.70		
Allocation Left			\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ (5,000.00)	\$ 9,922.30	\$ -	\$ -	\$ -	\$ 9,631.43		

Spend Down: [How to Read A Spend Down](#)



EANS, Use of Funds

Adjusting current budgets, planning for EANS II

- Adjusting EANS funds within your existing CRRSA EANS budget
- Maximizing the effectiveness of your CRRSA EANS I & ARP EANS II funding
- Aligning EANS programs (i.e. Title)
- Initiating long-desired programs
- Strategic planning for long-term services

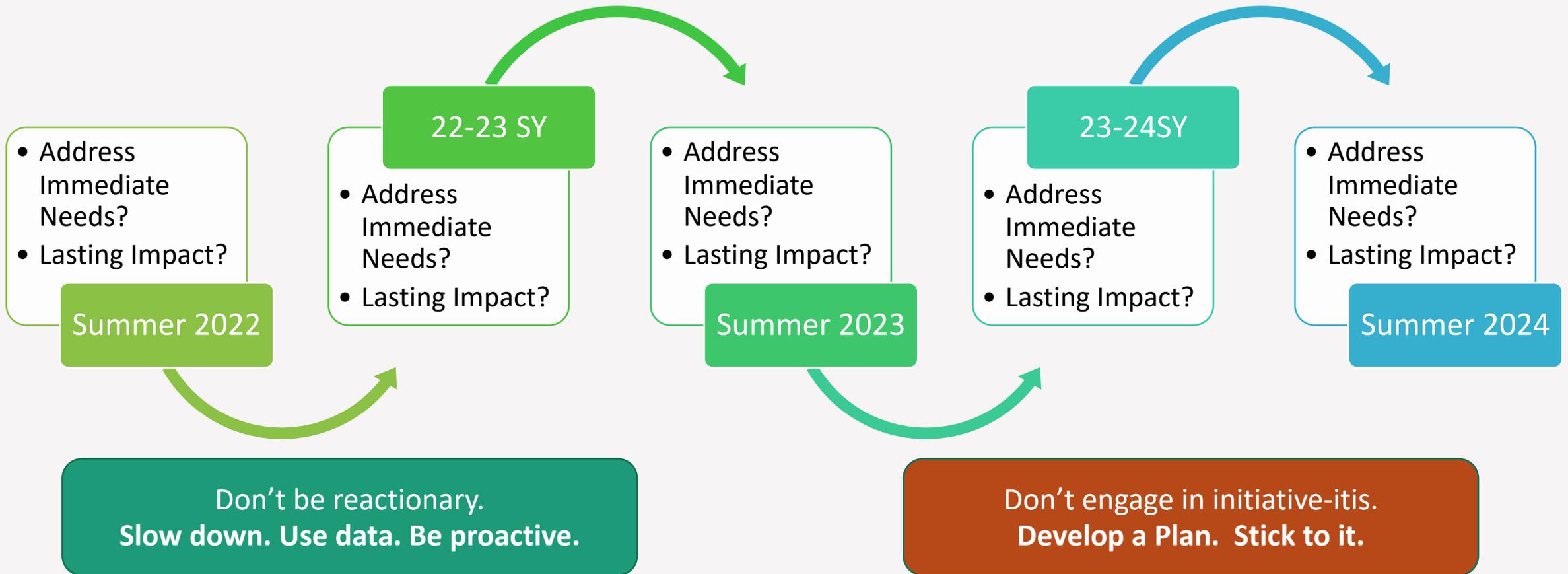


Pieces to the Puzzle

Designing Coherent Solutions to Address Learning Loss.



How will you know if EANS mattered?



Solution: Interventions to Address Learning Loss



Staffing

- Push-in Specialists*
- Interventionists *
- Counselors*
- Tutors*
- Classroom Aides
- Technology Assistant
- Onsite Substitute Teacher
- School Nurse
- COVID Coordinator
- Site-based Mentors & Coaches**
- Parent Engagement/Support Specialists***

Staffing + FACTS ES Support

*Math & Reading Intervention Programs, Cohort supports including interventions PD, office hours, site visits, Vosaic observations and access to research- and evidence-based teaching and learning strategies.

** Training for site-based coaches

***Access to Parent Engagement resources

Summer School

Phonics/Literacy Intensive

Math & Reading

STEM Enrichment

STEM Sports

Culture & Geography

Literature-based Arts

Parent & Family Engagement Events

Solution: Professional Development



FACTS Education Solutions	Our PD	Our Featured Partners
<ul style="list-style-type: none">• Custom built sessions• Tailored to your school's vision and circumstances• Research-based content• Highly qualified presenters• Relevant topics• Onsite workshops, Webinars, Pop-up Coaching	<ul style="list-style-type: none">• Addressing Learning Loss (for Teachers, Aides, Specialists)• Redeveloping Instructional Plans*• Understanding Data** and Using it to Improve Teaching & Learning <p>*Teachers can earn stipends for work outside of contracted work hours</p>	 <p>Loyola Marymount University iDEAL Institute Innovation in Digital Education and Leadership</p>  

Solution: Instructional Coaching



FACTS Education Solutions	Teacher & Team Coaching
<p>Teacher Coaching:</p> <ul style="list-style-type: none">• 6-week Cycles• Vosaic video + Virtual conversation• Toolkits• Trained Coaches	<ul style="list-style-type: none">• Tier I Practices in Math/ELA• Fundamentals of Teaching• Humanities• STEM• Differentiation• Interventions• Early Childhood Teaching & Learning• Executive Functioning• Explicit & Systematic Phonics• SEL, Inclusion, ELL

Solution: Leadership Coaching



FACTS Education Solutions

Leadership Coaching:

- 5-8 sessions per cycle
- Strategies/tools
- Reflection + Resources
- Educated/Experienced Coaches

Leaders & Leadership Teams:

Principals, APs, Dept. Chairs, etc.

Instructional Leadership

Instructional Leadership:

- Executive Leadership Options
- Organizational Leadership/Operational Vitality
- Instructional Leadership: Data
- Instructional Leadership: Walkthroughs
- Instructional Leadership: Curriculum & Instruction
- PLC Leadership Progression
- Curriculum Adoption Process & Tools



Jackie Dengel
Regional Vice President



Lindy Broom
Sales Support Coordinator



Talia Klepper
Partner Success Manager



Jamie Maxwell
Partner Success Manager

Montana Support Team

FACTS Ed's EANS Montana Support Team



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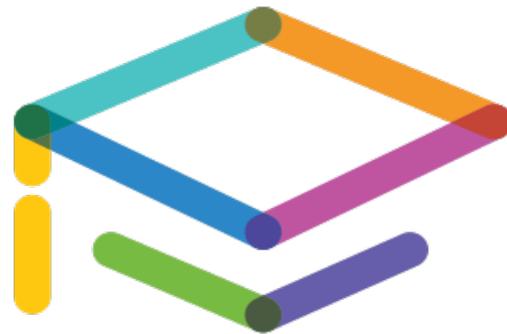
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Thank you!

A copy of this slide deck and a recording of this webinar will be posted on Montana's OPI website



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EDUCATION SOLUTIONS