



ESSER Guidance Sessions – December

Transition Planning

Prepare, Prevent, and Respond

December 14, 2023

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PRESENTER

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ESSER Team Contact Info



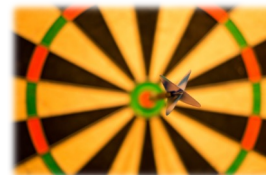
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Goals For This Session

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



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Transition Planning - Factors to Consider

- Transitions – ESSER changed everything
 - Expected, unexpected, slow migration and/or **sudden**
 - Employee leaves due to **retirement, illness, change** in employment
 - Workload changes (increases and/or decreases)
 - Breadth and/or depth changes due to internal and/or external factors
 - Duties change
 - Scope (breadth and/or depth) changes due to external or internal factors
 - ESSER increase in money to districts
 - Customer needs change
 - Physical tragedy changing setting

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Transition Planning – Areas of Impact

- Change is Stressful – even winning the lottery
 - Employees Workplace Satisfaction
 - Employee Health
 - Organization Health
 - Customers Satisfaction
 - Compliances
 - Expenditures
- All impact resource consumption



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Transition Planning – Steps

- AmeriCorps Vistas
- Interns
- TAs

- Identify pros and cons to transition as well as barriers to success
- Position Audit – at least annually during performance evaluations
 - Gather relevant material, documents, ...
- Identify training needs
- Recruitment plan with a month overlap on transition
- Recruit
- Train
- Evaluate and update Transition material for next time

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Transition Planning

- Position Audit – at least annually during performance evaluations
 - Data flow diagrams – task
 - Workflow diagrams – projects
 - Calendars – points of contact (breadth and/or depth)
 - Contact lists – points of contact (breadth and/or depth)
 - Important files, compliances
 - Committee membership – points of contact (breadth and/or depth)
 - Job descriptions and organization chart
 - Data – stored, called, format
- This information needs to be communicated
 - Clear communication/training and reflection
 - Documentation

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Document Flow Diagram & Critical Paths

- Information flows
 - Who needs what? When?!
 - Who has the needed data? When can you get it?
 - Reports and format
 - Inputs and outputs
- You received invoices but didn't know you need E-Grants access.
- You received email indicating you had to complete an annual report, but you don't know what portal to use or where the previous one is.
- There is a sample somewhere, in a binder, on someone's laptop/server and the file name is??!!!



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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								
Guidance 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								

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Key Contacts and Connections

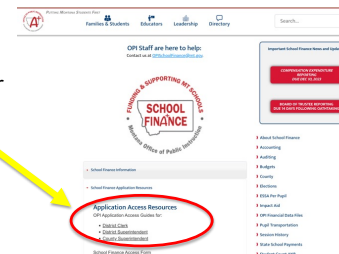
- List of Contacts
 - Name, Title, Email, Phone
 - Organization/Department
 - Source of Information (Why are they important?)
- Meetings
 - Regular, Periodic
 - Organization Name, When/Time/Reoccurrence, Purpose/For What?
- Software/Portal Access
 - [OPI Access Quick Guide](#)

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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/Leadership/Finance-Grants/School-Finance#10840412517-school-finance-application-resources>
- 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>

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Funding Sources

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



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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**.

Respond: retain staffing of classrooms with reduced enrollment, \$1,370,983; hire 2 additional elementary staff to keep class sizes below state standards, \$110,000;

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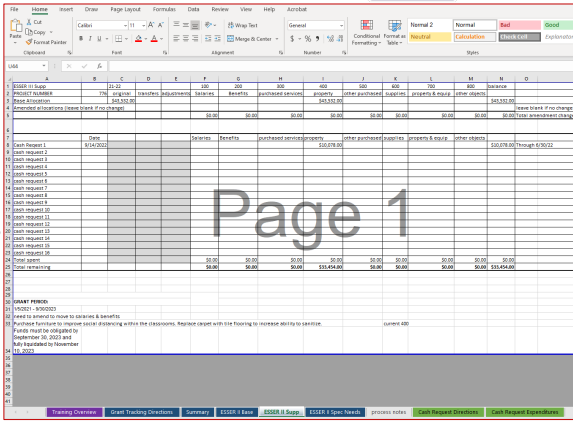


A Workbook for ESSER Grants




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, training here <https://youtu.be/Y8w93S1rO74>



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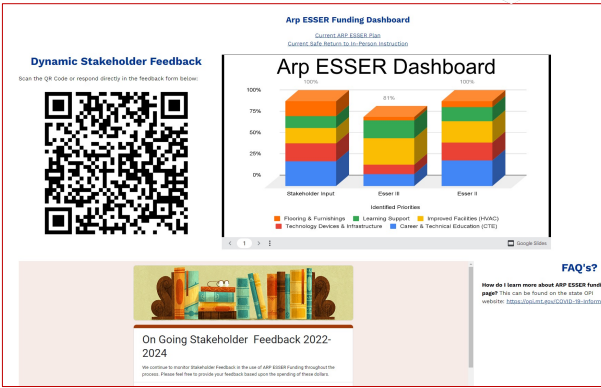


An ESSER Website and Parent Survey




THANK YOU to **Diane Woodard**, Superintendent of
Victor School district


- Victor School District developed and implemented a survey and then website dashboard to demonstrate ESSER spending.



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A Tracking log for ESSER large projects




THANK YOU to **Chris Campbell**,
Director of Business & Human
Resources Evergreen School
District


- Chris developed a Google sheet to help track large capital expenditure project with ESSER funding.

HVAC Upgrade Expense Tracking Master FY23				
Total Capital Outlay				\$2,787,958.24
Check Date	Vendor	Invoice #	Purchase Order #	Amount
08/03/2022	Montana Dpt of Revenue	08	230141	\$6,131.06
08/03/2022	Heartland Mechanical	5277	230142	\$606,975.34
08/03/2022	MORRISON MAIERLE	000221321	230143	\$6,746.83
9/12/2022	Heartland Mechanical	4	230385	\$565,908.01
9/12/2022	Montana Dpt of Revenue	08	230384	\$5,716.24
10/12/2022	Heartland Mechanical	5	230568	\$278,643.83
10/12/2022	Montana Dpt of Revenue	08	230567	\$2,815.58
11/9/2022	McKinstry	20059264	230639	\$1,300.00
12/14/2022	McKinstry	20059903	230788	\$2,900.00
12/14/2022	Heartland Mechanical	5305	230808	\$357,674.54
12/14/2022	Montana Dpt of Revenue	08	230809	\$3,612.87
2/1/2023	Heartland Mechanical	7	230948	\$240,467.97
2/1/2023	Heartland Mechanical	8	230949	\$96,341.06
2/1/2023	Montana Dpt of Revenue	08	230946	\$973.14
2/1/2023	Montana Dpt of Revenue	08	230947	\$2,428.97
2/13/2023	McKinstry	20058516	230993	\$20,000.00
2/13/2023	McKinstry	20061124	230994	\$3,400.00
2/13/2023	Heartland Mechanical	9	230991	\$52,889.96
2/13/2023	Montana Dpt of Revenue	08	230992	\$534.24
3/2/2023	McKinstry	20061711	231114	\$1,500.00
4/6/2023	Heartland Mechanical	10	231201	\$71,948.25
04/06/2023	Montana Dpt of Revenue	08	231202	\$726.75
04/06/2023	McKinstry	230712	231216	\$1,400.00

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An ESSER Survey for Parents




THANK YOU to **Les Meyer**, Superintendent of Frenchtown School District

- Frenchtown developed and conducted a survey to gather meaningful engagement on ESSER spending.

The ARP ESSER Plans along with the Continuity of Services Plan are on the FTSD website if you wish to review the full documents. www.ftsd Below is a survey for you to provide feedback regarding FTSD's attempts at addressing the Priorities as outlined. Thank you for your time.

- Do you approve of the district's attempts to follow the Priorities as outlined?
- Are there ideas you would like to share regarding the Priorities as outlined?

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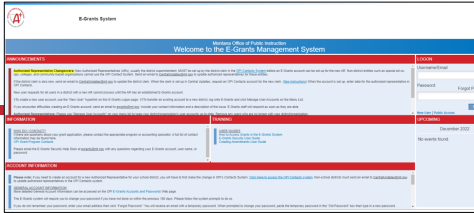


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E-Grants Overview

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](https://www.opi.mt.gov/essertoolbox):

- Navigating E-Grants** – August 9, 2022 <https://youtu.be/Fjpm7h490ek>
- Amendments** – September 21, 2022 <https://youtu.be/ShOlw9eLo2Q>
- 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>

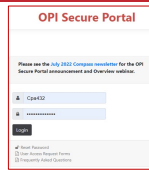
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Contact Info – Security Changes


- Despite your name(s) not showing on the E-Grants Contact Information tab, you *have all the rights of the previous staff members*
- To ensure that your name is listed on any new grants you submit, please have the district 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

- Select **Manage User Accounts**.
- On the **Manage User Accounts** page, the user will see a link with their name.
 - If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity
- Amend Current Access** to add an additional business role to an existing assigned LE.
- Add Additional LE** to request access to a different LE.
- 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.
Non-AR users may not remove themselves.

Putting Montana Students First 

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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**


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 offered a more in-depth training in August, which you can view here: <https://youtu.be/Eipm7ha9oek>

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Resources at OPI.MT.GOV

Welcome to the Office of Public Instruction

Superintendent Elsie Antezon 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.

EDUCATION SAVINGS ACCOUNT STEERING COMMITTEE APPLICATION

ESSER Self-Assessment Monitoring Countdown

Accountability

ESSER Grants Timeline

ESSER Grants Managed by MT Schools

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THANK YOU!

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