

House Bill 152/ House Bill 5

Revenue Estimates

12-15-08 (\$135 million)

1-15-09 (\$ 85 million)

HOUSE BILL 2

Revenue – RTIC 11-15-2008

Expenditures – 12-15-2008 (\$135 M)

General Government

Public Health and Human Services

Natural Resources/Transportation

Corrections/Judiciary

Education

Structural Balance

\$277 million fund balance

(\$55 million)

\$222 million fund balance

ARRA (Economic Stimulus) H.R. 1

Transportation Labor and Industry Medicaid Health Programs

EDUCATION

Appropriation Enhancements \$92.918 million total

28 % of MT school districts don't receive Title 1-A

Title 1-A \$38.5million

Title 1-A -\$6.242 million

Title II-D - \$4.838 million

IDEA - \$43.038 million

Homeless Children - \$300,000

School Modernization

Title 1A- formula - \$44.064 million

Higher Education Building Fund - \$19.2 million

State Stabilization Fund \$196 million

39 percent Governor plan

61 percent Education \$119 million

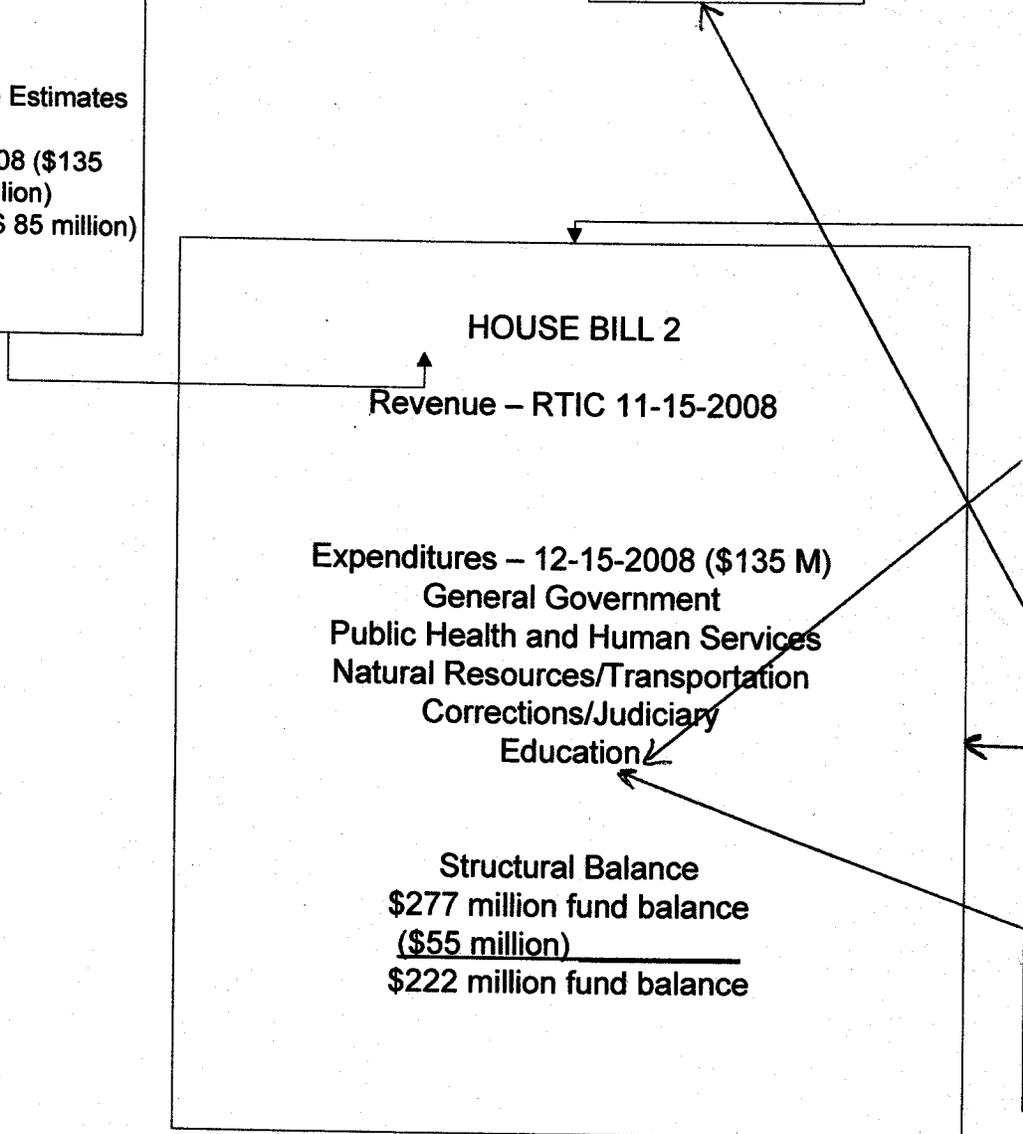
1. MOE – FY 2006

2a. K-12 FY 2008 level % or \$\$

b. Higher Education % or \$\$

c. K-12 Title I schools

Higher Education Pell grants \$60.9 million



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General Government
Public Health and Human Services
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Education

Structural Balance
\$277 million fund balance
(\$55 million)
\$222 million fund balance

ARRA (Economic Stimulus)
S. 336 as amended
Transportation
Labor and Industry
Medicaid
Health Programs
EDUCATION

Appropriation Enhancements
\$90.676 million total
28 % of MT school districts don't receive Title 1-A
Title 1-A \$38.1 million
Title 1-A -\$4.4 million
Title II-D - \$4.838 million
IDEA - \$43.038 million
Homeless Children - \$300,000

School Modernization
Title 1A- formula - \$0
Higher Education
Building Fund - \$0

State Stabilization Fund
100 percent Education \$97 million
1. MOE – FY 2006
2a. K-12 FY 2008 level
% or \$\$
b. Higher Education
% or \$\$
c. K-12 Title I schools

Higher Education
Pell grants
\$49.5 million



AMERICAN RECOVERY AND REINVESTMENT (FEDERAL STIMULUS) ACT OF 2009
EDUCATION (SECTION E)

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OP/I/Title I-A Grants to States (ESEA)	Education of disadvantaged children for services to low achieving K-12 students	Used for purposes authorized in Title I-A of the ESEA. S. 336 require 15 percent used for children not at grade level and to support preschool programs. Reports on per pupil expenditures for FY 2009 filed with state, state requirements on maintenance of effort	To school districts by formula grant based upon the FY 2008 current allocation of Title I-A grants 1/2 on targeted grant formula component and 1/2 on EFIC formula	H.R. 1/S. 336 Total federal: \$11 billion H.R. 1 \$5.5 billion for FFY 2009, \$5.5 billion for FFY 2010 S. 336 \$11.0 billion for FFY 2009 Estimated state: H.R. 1 \$19,057 in FFY 2009 \$19,057 million in FFY 2010 S. 336, \$38,115 million in FFY 2009	Yes	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds
OP/I/Title I-A School Improvement Grants	Supplementary funds for school	95% to local school districts for grants of	States apply for grants	H.R. 1/S. 336 Total federal:	Yes	Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds,

Agency/Function (ESEA)	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OPI/Education Technology (ESEA Title II-D)	Increase access to educational technology, support the integration of technology into instruction, enhance technological literacy and support technology-related professional development of teachers	\$50,000 to \$500,000 to meet goals of school improvement plans, maintenance of effort requirements	95 percent to local school districts, 50 percent by formula, 50 percent competitively, maintenance of effort requirements	To school districts in proportion to Title IA grants H.R. 1/S. 336 Total federal: \$1 billion H.R. 1 \$.5 billion for FFY 2009, \$.5 billion for FFY 2010 S. 336 \$1.0 billion for FFY 2009 Estimated state: H.R. 1 \$2.419 million in FFY 2009,	Yes	Issues/Comments/Legislative Decision Points S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds Funds based on populations of low-income families in school district, 28 percent of Montana school districts would not receive funds, S. 336 currently restricts funds based on taxable base of district, would eliminated Bozeman elementary from receiving funds

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
				<p>\$2,419 million FFY 2010, S. 336 \$4,838 million in FFY 2009</p>		
<p>OP/I/Credit Enhancement Initiatives to Assist Charter Schools (ESEA Title V-B-2)</p>	<p>For acquisition, construction, or renovation of public charter schools</p>		<p>Competitively awarded at federal level</p>	<p>H.R. 1 Total federal \$25.0 million for FFY 2009 S. 336 not included Estimated state \$0</p>	<p>Yes</p>	
<p>OP/Fund for the Improvement of Education (ESEA Title V-D)</p>	<p>Innovative K-12 educational activities.</p>		<p>Competitively awarded at federal level</p>	<p>H.R. 1 \$200.0 million in FFY 2009 S. 336 not included Estimated state \$0</p>	<p>Yes</p>	
<p>OP/Impact Aid Section 8007: Construction (ESEA Title VII)</p>	<p>To compensate school districts for substantial and continuing financial burden resulting from federal activities</p>	<p>Construction and upgrading facilities with high percentages of children living on Indian lands</p>	<p>To school districts by formula and competitively awarded grants</p>	<p>H.R. 1 \$100.0 million in FFY 2009 S. 336 not included separately for allocated as part of the construction</p>	<p>Yes</p>	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much? program Estimated state: ?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
OP/I/DEA, Part B and Part C	Special education and related services for children with disabilities for school age children and preschool children with disabilities	Uses allowable under IDEA, Part B, maintenance of effort	To school districts by formula based on the number of children requiring special education	H.R. 1/S. 336 13.0 billion H.R. 1 \$6.0 billion in FFY 2009, \$7.0 billion in FFY 2010 S. 336 \$13.0 billion in FFY 2009 Estimated state: H.R. \$35.639 million in FFY 2009, \$43.208 million in FFY 2010, S. 336 \$77.217 in FFY 2009	Yes	Increases federal portion of special education costs in school districts to 26.3% of the national average per-pupil expenditure in H.R. 1 in FFY 2009 and 26.8 percent in FFY 2010. S. 336 is estimated to be 37.6 percent in FFY 2009. Montana provides additional funding within the direct state aid component of the formula.
OP/I/DEA, Part C	Special education and related services to serve infants and toddlers with disabilities	Uses allowable under IDEA, Part C	To school districts by formula based on the number of children requiring special education	H.R. 1 \$600 million \$300. million in FFY2009, \$300 million in FFY 2010, S. 336 \$500 million in FFY 2009 Estimated state: \$?	Yes	
OP/I/McKinney-Vento	To provide		To states	H.R. 1 \$33	Yes	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
Homeless Assistance	education access for homeless children and youth		based on formula of number of homeless student in FY 2008 competitive grants for school districts	million in FFY 2009, \$33 million in FFY 2010 S. 336 \$70 million in FFY 2010 Estimated state: H.R. 1 \$300,00 FFY 2009, \$300,000 in FFY 2010, S. 336 \$219,000 FFY 2009		
OP/School Modernization, Renovation, and Repair	To modernize, renovate and repair elementary and secondary schools		Allocated to states based on Title 1-A funding, minimum of \$5,000 per LEA	H.R. \$14 billion in FFY 2009 S. 336 \$16 billion in FFY 2010 S. 336 as amended \$0 Estimated state: H.R. 1 \$44,064 million FFY 2009, S. 336 \$77,575 in FFY 2009 S.336 as amended \$0.00	Yes	Funds based on populations of low-income families in school district; 28 percent of Montana school districts would not receive funds. S. 336 currently restricts funds based on taxable base of district, would eliminate Bozeman elementary from receiving funds S. 336 as amended removed funding
MUS/Pell Grants (discretionary appropriations)	Grants made available to low-income		To students, need-based	H.R. 1 Total federal \$15,636	No	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
	<p>undergraduate students to help offset their costs associated with obtaining a postsecondary education</p> <p>Pell Grants are the foundation of a student's financial aid package because all other forms of federal student aid are awarded after the Pell Grant award amount has been determined</p>			<p>Billion</p> <p>Maximum grant would increase \$619</p> <p>Est. Amount to Montana students \$60.9 million</p> <p>\$.336</p> <p>Total federal \$13.869 billion</p> <p>Maximum grant would increase \$400</p> <p>Est. Amount to Montana students \$49.5 million</p>		
MUS/Pell Grants (mandatory appropriations	Mandatory add-on to the discretionary grant		To students, need-based	H.R. 1 (only) Total federal \$1.514 billion	No	
MUS/Work-Study Program	Need-based federal student aid program that provides undergraduate, graduate, and professional		To institutions of higher education, based upon existing	H.R. 1 (only) Total federal \$490.0 million Est. Amount to Montana not available	No	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
Perkins Loan Program	Operates as an institutional revolving fund under which institutions of higher education make available low interest federal student loans	Funding is to be provided for federal capital contributions to the revolving loan funds of participating institutions of higher education	To institutions of higher education, based upon existing distribution formulas	S. 336 (only) Total federal \$61.0 million Est. Amount to Montana not available	No	
Student Aid Administration	Increased funding to the U.S. Dept of Education to administer federal student aid programs		Money is for U.S. Department of Education	H.R. 1 (only) Total federal \$50.0 million	No	
Teacher Quality Partnership Grant Programs	Competitive grants for improving teacher education programs, strengthening teacher recruitment efforts, and providing training for prospective teachers		Competitive grant; state must apply	H.R. 1 and S. 336 Total federal \$100.0 million	Yes	OCHE currently receives grants from this federal program. These federal funds are appropriated in HB 2 and are budgeted in Program 03-Improving Teacher Quality.
Higher Education Modernization, Renovation, and Repair	Money may be used for modernization, renovation, and repair of facilities	Priority must be given to minority serving institutions, institutions that have	Allocated to state higher education agencies	H.R. 1 Total federal \$6.0 billion	Yes	

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
	that are primarily used for instruction, research, or student housing	been impacted by a major disaster, institutions that will carry out projects to increase their energy efficiency.	based upon the number of full-time equivalent undergraduate students enrolled in public and private not-for-profit postsecondary education schools	Est. Amount to Montana \$19.2 million S. 336 Total federal \$3.5 billion S. 336 amended to \$0		
Institute for Education Sciences	Design, development, and implementation statewide longitudinal data systems to enable states to use, manage, and analyze individual student data in ways consistent with the ESEA. The data systems could include data systems that contain postsecondary and workforce information.		Competitive grants to state higher education agencies	H. R. 1 (only) Total federal \$250 million	Yes	
Governor's Office/OP/State Fiscal	61% of state allocation	Maintenance of Effort Required	Allocated to states	H. R. 1 \$39.5 billion	Yes	The allocation of the 39% portion may be determined by the legislature The allocation of the 61% portion goes allocated.

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
Stabilization Fund	(approximately \$120 million) must be used to support elementary, secondary, and postsecondary education. The FY 2008 state funding level must be restored first. Any remaining funds from the 61% allocation must be distributed to local education agencies.	State must establish a longitudinal data system Funds cannot be used for capital construction purposes. Funds may not be used to enhance higher education endowment funds. Institutions of higher education must use any funds for educational and general expenditures, and in such a way as to mitigate in-state student tuition increases. Reports Required <input type="checkbox"/> How funds were used <input type="checkbox"/> How funds were distributed <input type="checkbox"/> # of jobs created or saved <input type="checkbox"/> Tax increases averted <input type="checkbox"/> State's progress in certain educational areas <input type="checkbox"/> Tuition and fee	61% based on state's relative population of individuals ages 5 to 24 39% based on the state's relative population	in FFY 2009, \$39.5 billion in FFY 2010 S. 336 \$79 billion in FFY 2009 S. 336 as amended: \$39 billion in FFY 2009 Estimated state \$196 million As amended: \$97 million		Issues/Comments/Legislative Decision Points 1. To support K-12 education at the FY 2008 level 2. To support Higher Education at the FY 2008 level 3. To local school districts using the Title I-A funding formula, in Montana 28% of the school districts would not qualify for the funds As amended 100 percent to education under allocation formula above

Agency/Function	Description	Conditions on the Money?	How Distributed?	How Much?	Need to be Appropriated?	Issues/Comments/Legislative Decision Points
		<p>increases for resident students imposed by public institutions of higher education and a description of any actions taken by the State to limit those increases</p> <ul style="list-style-type: none"> o Resident student enrollment at institutions of higher education, including those eligible for Pell Grants or other need-based assistance 				