

| Submission time | Did you register as a user on the Donation Portal during the early registration period in December? | On January 3, 2022, did you attempt to record a donation? | Were you able to record all the donations you received? | If you were unable to record one or more donations, how many donations were you unable to record? What was the total amount of donated that you were unable to record? | Were you aware of the information the Department offered before the portal opened? If so, how would your rate that information? | Should the Department provide information and training every year? | How was your overall experience with the Education Donation Portal? | Any other comments or feedback that you would like to share? |
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| 1/7/22 11:29:08 | Yes | No | Yes | n/a | Yes. Very good. The webinar was very informative. | I do not think yearly training is needed, but access to the webinar recording or an instruction booklet for new school officials would be helpful. | Very good. | n/a |
| 1/7/22 11:34:01 | Yes | Yes | No | 30,000 | yes, the information was adequate to set up the portal, but to actually enter donations was not that clear. | Yes | Disappointing | I strongly believe that this opportunity is highly inequitable. Larger districts who have personnel available to prepare and login in with multiple portals were highly successful, where smaller districts were not. This is not an equitable opportunity for all schools in MT. |
| 1/7/22 11:37:14 | Yes | Yes | Yes | I was able to record all of my donations. | Yes, and the information on the portal is sufficient. | Sending our information to all education providers, be it public or private would be helpful. | Pretty easy and straight forward. | |

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| 1/7/22 11:37:47 | Yes | Yes | Yes | Yes I was and it was good information. The webinar was most helpful. | Yes, you should provide yearly training. There are always new ARs for districts and they will need the information. Also, make sure districts know if they have to reregister each year or if their AR has changed they may not be able to access it on the day donations can be made so checking early will be helpful. | It was very easy to use. Hopefully more donations can be made in the future. | Is there any thought to the limit what each district can get not just what each taxpayer can donate? We did receive a donation, but I have heard from other districts there was disappointment that one district in the state received over half the donation amount available. - Thank you form making the process streamlined and easy to use. |
| 1/7/22 11:38:41 | Yes | No | unable to record 13 donations for \$67,000 | The recorded video and instructions were very informative. | Not unless the content changes. The recorded video is enough. | It is very easy to use. Overall experience was good. | I think the limit for each donor should be a smaller number maybe around \$50,000 instead of \$200,000 to allow for smaller donors to able to benefit from the tax credit. Also, more schools would be able to participate. |
| 1/7/22 11:47:22 | Yes | Yes | | Excellent | Only if something changes | Outstanding | Thanks for all the work |

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| 1/7/22 11:50:01 | Yes | No | We had 17 donors totaling \$147,000. We had 5 people in our district simultaneously entering donations into the portal at exactly 8:00am. We were only able to record 4 donations for a value of \$80,000 which left 13 donors and \$67,000 on the table. | Yes. Information for the most part was good, but the guidance that came out days before the portal opened declaring that the district had to have the money in hand and couldn't rely on a promise of having a donation or pledge. I'm curious how the DOR would even be able to know or tell if that actually happened? Is there an audit process? It wasn't ever communicated in the administration of this change in the bill and I can find no language where that is a requirement. | Probably. | In all, it was okay, but truly unfair to anyone who wasn't as organized or who didn't realize how fast these credits would be claimed. We were super organized, recognized how quickly it would go, did everything by the book and we and the taxpayers didn't get the full benefit. | The model needs to be changed for next year. If experience tells me anything, even with the donation amount being doubled, it will be gone even faster. Districts who were looking to enter a donation now know how quickly it will go. More people will be logged on fighting for the same funding. For a small district like Big Sky to receive 70% of the overall credit creates an imbalance. It does nothing to address the size of the district or the affluence of a particular community and for businesses or people who are able to make large donations (\$200,000) it reeks of a program that benefits the wealthy. Aside |
| 1/7/22 12:10:38 | Yes | No | I personally successfully submitted 2 donations and was unable to submit a 3rd. My school district was able to submit 8 of the 14 that we had. | The information was very helpful and thorough. | I think so. | It was very user friendly and easy to use. | |
| 1/7/22 12:17:02 | Yes | No | N/A | Training video was worthwhile. | Yes please. | The account set up was easy. No donations were recorded so I have no comment on that process. | The wording of question #3 makes it difficult to answer. I did not try to record any donations because I did not receive any. |
| 1/7/22 12:21:14 | Yes | Yes | NA | Excellent webinar and help with follow-up issues. | Yes | It worked. There was a lot of interest. High volume of donations. The system didn't crash. | System worked. Legislatively, a smaller donation cap might allow more people to participate. |

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| 1/7/22 12:30:01 Yes | No | | Yes. However, I requested that my clerk be given access and she never received the email to do so. I reached out and the Dept. said an email was sent. My clerk still hasn't been given access. | Yes! | fine |
| 1/7/22 12:30:14 Yes | Yes | No | <p>I had a check for \$7000 and was unable to record. I hit submit at 8:06am - and it was all gone.</p> <p>I pulled up the portal before 8am - waited for it to open - and keyed in all info. I had it in right away - but not thinking the money would go that fast, I reviewed everything I typed in to make sure I didn't have any errors - and then went to hit submit at 8:06 and missed out.</p> | The webinar was great. | <p>Yes - but pretty frustrating as I am a one man show here - so we don't have multiple people keying in the amount.</p> <p>The portal was great - and the person that created it and the webinar given were great.</p> <p>I think to make it more equitable - EVERY school district in the state should have the same amount available to receive at the beginning to key in. (So, cap every district at 10,000). Then, if by like May 1st, the amount for some schools have not been allocated, then open up the remaining dollars available to anyone like it was this year. It just seems crazy that one school received 680,000 of the million available - and multiple schools that I have talked to didn't even get \$1000 entered even though we keyed in right away too.</p> |

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| 1/7/22 12:50:52 | Yes | No | \$113,000 | mt.gov still had a link on their site that didn't work, so it slowed the process. | Training never hurts; however, the more beneficial maneuver would be to increase the \$1,000,000 limit to much more. The fact that generous people are looking for excuses to donate to a good cause, such as education, is amazing. It was disheartening when they could not do so. | Frustrating | Eight very rich school districts were able to benefit from this process, which is not equitable at all. |
| 1/7/22 13:03:38 | Yes | No | N/A We did not receive any donations. | Yes, the information was outstanding. Very high quality. | Yes, a quick reminder and update would be helpful | Excellent-Everything worked as it was explained. | The portal was a very good tool. Please take over the CSCT Funding situation from DPHHS and OPI..... |
| 1/7/22 13:15:52 | Yes | No | one donation in the amount of \$25,000 | Yes - the webinar (and recording) were very useful to get setup & understand the system. thank you. | yes! once a year processes are very difficult to remember year to year, so refreshers are always helpful. Also, there is also clerk & staff turnover that may impact the following year and training would be a good reminder to get this updated sooner than later. | Great. Easy to use . | thank you for all your work to get this setup for us. Can't believe the cap went SOOOO fast! Sad the process is so competitive for us. |
| 1/7/22 16:07:59 | Yes | No | 0 | Yes. Email | Yes | | |
| 1/7/22 16:51:41 | Yes | No | One (the only one we received prior to credits being met) \$5,000 | Yes, the webinar for the portal was excellent. | If things change, yes. | Very good, well designed site. | It would be nice to know ahead of time when the portal opens for 2023. I will definitely be logged on exactly when the portal opens again next January. I missed recording a donation by only a few minutes. |

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| | | | | | | | | Why did the richest district in the state (Big Sky) get the majority of the available funds? Many districts invested significant amounts of time attending training on this funding opportunity. In the end, only a few districts across Montana benefited from this program. From my perspective, underresourced schools lacking enhanced technology supports (such as those readily available to the Big Sky District) don't stand much of a chance to benefit from this program. |
| 1/9/22 10:02:02 | No | No | N/A | Yes | Yes. | N/A | | |
| 1/10/22 9:13:04 | Yes | No | No | Yes, I think it was fine. | Yes. | Okay. | | |
| 1/12/22 8:22:56 | Yes | Yes | No | 8 Donations, \$35,500 | Good information, the webinar was very informational at over an hour in length. Since the portal was only open for a few minutes, it seems like I was "overtrained". | The detail the webinar went through was not necessary -- the portal is very user friendly. | Very User Friendly -it must have been some internet traffic jam - it was some kind of luck that I was able to enter a couple of donations. | I had no idea it would be so competitive time wise. We will be ready next year! |
| 1/18/22 10:13:16 | Yes | No | | | | | | |
| 1/18/22 10:23:39 | Yes | No | | Yes, emails | Yes | We did not have an opportunity to participate because the cap was met too quickly. | All schools should be able to participate. | |

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| | | | | | | | | How can access be created for schools who did not have personnel available to jump on the site immediately at 8:00? Our district has interest but not at the expense of providing care or services to our students and community. Possibly an evening log in and application time would be more equitable across the state for the various restraints that are in place out across our public education districts. |
| 1/18/22 10:23:49 | Yes | No | No | None | adequate | Absolutely | not a positive experience | |
| 1/18/22 10:31:36 | No | No | No | The system was already saying full. | We did attend virtual training. | Yes, this is a once a year event, when looking at how fast the money went. | Okay | Yes, there needs to be a better way of allowing taxpayers to support education in all locations of Montana. |
| 1/18/22 10:33:46 | No | No | No | NA | Yes. Good. | No | I did not participate as I thought the entire process was ridiculous. Small districts have almost no hope of receiving any donations. | It is a very flawed system. Too much of a lottery system and too difficult to receive any kind of donation. |
| 1/18/22 10:42:24 | Yes | Yes | Yes | | Yes. 4 out of 5 | Probably a good idea | 4 out of 5 | The issue I see isn't technical, but that there clearly is a much stronger interest in supporting education financially in the state then there are opportunities. |
| 1/18/22 10:53:25 | No | No | No | No donations were received as of now. | No information was provided to me | Yes, that would benefit the preparer for this type of documentation. | Okay | Why do the donations have to be recorded if it is a free will offering? |

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| 1/18/22 11:31:53 | Yes | No | NA - did not record any donations, 0 donations received. | Yes. Rate 7/10 | Yes, considering how fast the tax credits were claimed, every district needs to be aware of the competition to claim those credits on behalf of their district, regardless of district size. Sometimes staff of smaller districts are extended to their full capacity. | Registration was fairly smooth, our district did not have any donors lined up to tax advantage, though we did have an inquiry about a week after the portal opened. |
| 1/18/22 11:52:15 | Yes | No | Two donations totaling \$4,000. | Yes. MTSBA. | Not necessary | It wasn't hard and the instructions were clear. There opportunity was puny. Per pupil limit to make this more equitable and not a race. |
| 1/18/22 15:10:06 | Yes | Yes | | Yes, I was aware but not from the DOR, but from the MT School Board Assn. Excellent information passed on to them to pass on to us. | yes | good The pool of money went very fast!! We hope that the state will continue to provide this tax credit to our community members. |